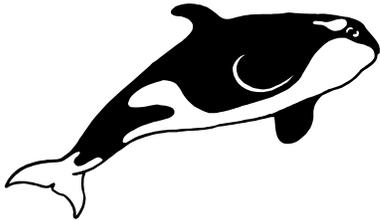


Northwest Fisheries Science Center
Southern Resident Killer Whale
U.S. Whale Watching Industry
Social Survey



Sponsored by:
NOAA Fisheries (National Marine Fisheries Service)
Northwest Fisheries Science Center

Questions?

Please Contact Suzanne Russell, NWFSC Social Scientist
Phone: (206) 860-3274
Email: [nwsc.wwindustrystudy@noaa.gov](mailto:nwfsc.wwindustrystudy@noaa.gov)

OMB Control No.: 0648-0540

EXPIRATION DATE: 05/31/2009

This survey is voluntary.

ALL RESPONSES ARE ANONYMOUS.



NWFSC Southern Resident Killer Whale Watching Industry Social Survey

SURVEY INFORMATION

WHO IS CONDUCTING THIS STUDY? The Socio-Economics group at the Northwest Fisheries Science Center (NWFSC), studies the human dimensions of ecosystems. This means we study human society as it relates to marine resources. Currently, we are performing this social science study to better understand the Southern Resident Killer Whale (SRKW) watching industry. This project is jointly funded through the Marine Mammal Program and the Socioeconomics program of the NWFSC. The NWFSC is a part of the National Marine Fisheries Service (NMFS).

WHAT IS THE PURPOSE OF THE STUDY? The purpose of this study is to create a description of the United States Southern Resident Killer Whale watching industry and its participants. The study focuses on the industry operating in the navigable waters of the Greater Puget Sound area. This is the first study of its kind and is hoped to be replicated in years to come to track the changes within the industry.

HOW WILL THIS STUDY BE USED? Upon completion of this study, any reports generated will become publicly available to those interested. Collection of social science information by NMFS is fairly new. In the future, such information may be used to inform human/social impact assessments and to meet regulatory requirements. For example, those concerning fishing communities in the Magnuson-Stevens Fishery Conservation Act National Standard 8 and those concerning minorities in Executive Order 12898 – the Environmental Justice Initiative.

HOW IS THIS SURVEY ORGANIZED? The survey is organized into five parts; demographics, individual participation, business characteristics, industry trends, and effects in the community. The questions allow us to better understand roles in the industry and the industry's' importance in the community.

HOW LONG WILL IT TAKE? This survey takes most people 1 hour to complete.

ARE MY ANSWERS ANONYMOUS? This is an anonymous survey. Please do not write your name anywhere on this survey. Your name may be tracked in a separate document to be used to avoid duplication of survey respondents, but there will be no link between a specific survey and your name.

DO I HAVE TO PARTICIPATE? Your participation and input is **VERY** important and will help us to better understand the unique opportunities and challenges presented in this industry. However, this is a **voluntary** survey and you may choose to skip any question or end at any point in the survey.

HOW WAS MY NAME OBTAINED? Depending on your role in the industry, your name was obtained through ownership of a vessel, web-sites advertising whale watching activities, your link to the Whale Watch Operators Association of the Northwest (WWOANW), through your company's recommendations, or through third party referrals.

Thank you for your participation. Preliminary results of this research are expected to be available in January 2007. Please contact Suzanne Russell, NWFSC Social Scientist for more information. She may be reached via email at nwfsc.wwindustrystudy@noaa.gov, or by phone: (206) 860-3274.



Filled out by survey administrator

Code number: _____ Survey Location: _____

Date: _____ Name of administrator: _____

Notes: _____

SURVEY INSTRUCTIONS

All answers given in this survey should reflect YOUR OWN perception of the US Southern Resident Killer Whale (SRKW) watching industry based on your personal experience and knowledge.

	← Mark one answer per question unless otherwise specified
	← Fill in ovals completely
Use a pen in black or blue ink: Do not use pencil	
Please write legibly	
Follow the directions carefully	
Please ask questions at any time	
Most importantly, THANK YOU FOR YOUR TIME!	

SURVEY DEFINITIONS

“**SRKW**” refers to the population of Southern Resident Killer Whales.

“**SRKW watching industry**” refers to the commercial Southern Resident Killer Whale watching industry of the United States which operates in the Greater Puget Sound Region (also referred to as the Puget Sound, and the Salish Sea). This industry accepts payment to take guests (tourists, researchers, visitors, etc.) to view or have the intent of viewing the SRKW. Tours can include, but are not limited to, transportation by marine vessel including kayaks, automobile, or other methods.

“**Participation in the industry**” refers to those individuals who, either through a paid or volunteer position, are engaged in the SRKW watching industry as defined above. This includes, but is not limited to, roles such as owner, operators, deck crew, guides, naturalists, ticketing, administrative, and shore support.

“**Recreational whale watching**” SRKW watching which occurs on privately owned vessels that do not take passengers for hire.

“**SRKW watching season**” has been broken down into Peak, Low, and Off Season, as described below:

- Peak Season: Memorial Day weekend-Labor day,
- Low season: April 15-Memorial Day weekend and after Labor Day-October,
- Off Season: November-April 15

Questions? Contact NWFSC Socioeconomics Program
 nwfscc.windustry@noaa.gov
 1-(206) 860-3274 or 1-(206) 860-2442



Section A: DEMOGRAPHIC INFORMATION: START

Demographic questions help us to better understand the unique characteristics of people. These questions are important. They are standard questions in social science and can be compared to the U.S. Census data to better describe a specific population. **Please mark one answer per question unless otherwise directed.**

A 1 What is your gender?

Answer	
<input type="radio"/>	Male
<input type="radio"/>	Female

A 2 What is your age?

Answer	
<input type="radio"/>	17 and under
<input type="radio"/>	18-24 years
<input type="radio"/>	25-34 years
<input type="radio"/>	35-44 years
<input type="radio"/>	45-54 years
<input type="radio"/>	55-64 years
<input type="radio"/>	65 years and older

A 3 What is the highest level of education you have attained:

Answer	
<input type="radio"/>	Some high school
<input type="radio"/>	High school diploma or equivalent
<input type="radio"/>	Some college or vocational, no degree
<input type="radio"/>	Bachelors Degree
<input type="radio"/>	Graduate or professional degree

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Section A: DEMOGRAPHIC INFORMATION Continued

Please answer BOTH A 4 and A 5

A 4 Are you Hispanic or Latino?

Answer	
<input type="radio"/>	Yes, Hispanic or Latino
<input type="radio"/>	No, not Hispanic or Latino

A 5 What is your race? (Please mark all that apply)

Answer	
<input type="radio"/>	American Indian or Alaska Native
<input type="radio"/>	Asian
<input type="radio"/>	Black or African American
<input type="radio"/>	Native Hawaiian or Other Pacific Islander
<input type="radio"/>	White

A 6 What is your ancestry (ethnic origin)? (Please mark all that apply)

Answer	Answer	Answer	Answer	Answer	
<input type="radio"/>	Chinese	<input type="radio"/>	Italian	<input type="radio"/>	Mexican
<input type="radio"/>	English	<input type="radio"/>	Irish	<input type="radio"/>	Norwegian
<input type="radio"/>	Filipino	<input type="radio"/>	Japanese	<input type="radio"/>	Russian
<input type="radio"/>	German	<input type="radio"/>	Korean	<input type="radio"/>	Vietnamese
<input type="radio"/>	Other (please describe)				

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Section A: DEMOGRAPHIC INFORMATION Continued

A 7 How many members are there in your household (including yourself)?

Answer in #

A 8 What is your current marital status?

Answer	
<input type="radio"/>	Single
<input type="radio"/>	Married
<input type="radio"/>	Divorced
<input type="radio"/>	Widowed

A 9 Please estimate your annual **total** income before taxes

Answer	
<input type="radio"/>	Less than \$10K
<input type="radio"/>	\$10K-30K
<input type="radio"/>	\$31K-\$50K
<input type="radio"/>	\$51K-\$70K
<input type="radio"/>	\$71K-\$90K
<input type="radio"/>	Above \$90K

A 10 What is the percent of your total income derived from the SRKW watching industry?

Estimated % of total income derived from SRKW watching industry

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**Section A: DEMOGRAPHIC INFORMATION Continued**

- A 11** Please mark the circle which best describes how you are paid.
(Please mark all that apply)

Are you paid based on . . .	
<input type="radio"/>	. . .the number of hours you worked?
<input type="radio"/>	. . .the number of trips/tours you conducted?
<input type="radio"/>	. . .the number of days you worked?
<input type="radio"/>	. . . a flat salary?
<input type="radio"/>	. . . other pay determinations (<i>please describe</i>)

- A 12** Do you receive tips?

Answer		
<input type="radio"/>	Yes	→ GO TO A 12 a and A 12 b
<input type="radio"/>	No	→ GO TO A 13

- A 12 a** Did you include your tips in the above total income estimate?

Answer	
<input type="radio"/>	Yes
<input type="radio"/>	No

- A 12 b** Please estimate what percentage of your annual *total income* comes from tips?

_____ %

- A 13** Please indicate your permanent residence (where you are registered to vote): Please write legibly – Thank You

City/Town:
State:
Zip Code:

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Section A: DEMOGRAPHIC INFORMATION Continued

A 14 Please mark the following which best describe where you reside while participating in the SRKW whale watching industry AND the number of nights a week spent in that location. **(Please mark all that apply)**

Answer		Number of nights a week
<input type="radio"/>	I live in my primary residence.	
<input type="radio"/>	I rent housing in the area of whale watch operation.	
<input type="radio"/>	I live aboard the vessel.	
<input type="radio"/>	I stay with colleagues or family.	
<input type="radio"/>	I stay in company provided housing.	
<input type="radio"/>	I have other arrangements <i>(please indicate)</i>	

A 15 If you commute from your permanent residence, how often do you commute?

Answer		
<input type="radio"/>	Daily	→ GO TO A 15 a & b
<input type="radio"/>	Weekly	
<input type="radio"/>	Bi-Weekly	
<input type="radio"/>	Monthly	
<input type="radio"/>	Bi-Monthly	
<input type="radio"/>	Other <i>(please describe)</i>	
<input type="radio"/>	I do not commute	→ GO TO SECTION B

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Section A: DEMOGRAPHIC INFORMATION Continued

A 15 a What means of transportation do you utilize in your commute?
(Please mark all that apply)

Answer	
<input type="radio"/>	Car
<input type="radio"/>	Bus
<input type="radio"/>	Train
<input type="radio"/>	Ferry – Drive On
<input type="radio"/>	Ferry – Walk On
<input type="radio"/>	Motorcycle
<input type="radio"/>	Bicycle
<input type="radio"/>	Other <i>(please describe)</i>

A 15 b What is the approximate distance you commute?

Answer in miles

Section A: DEMOGRAPHIC INFORMATION: END

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Section B: INDIVIDUAL PARTICIPATION: START

In this section we seek to better understand how **you** participate in the industry and what has drawn you to this line of work. **Please mark one answer per question unless otherwise directed.**

B 1 Please indicate all those which best describes your current role(s) in the industry? **(Please mark all that apply)**

Answer	
<input type="radio"/>	Owner
<input type="radio"/>	Operator/Skipper/Captain
<input type="radio"/>	Engineer
<input type="radio"/>	Deck Hand
<input type="radio"/>	Naturalist
<input type="radio"/>	Assistant/ Jr. Naturalist
<input type="radio"/>	Guide
<input type="radio"/>	Logistics support
<input type="radio"/>	Administrative/Office
<input type="radio"/>	Maintenance
<input type="radio"/>	Volunteer
<input type="radio"/>	Other <i>(please indicate)</i>

B 2 Do you hold a U.S. Coast Guard (USCG) issued license?

Answer		
<input type="radio"/>	Yes	→ GO TO Q B 2 a
<input type="radio"/>	No	→ GO TO Q B 3

B 2 a Do you use your USCG license while working in the SRKW watching industry?

Answer		
<input type="radio"/>	Yes	→ GO TO Q B 2 b
<input type="radio"/>	No	

B 2 b What license do you hold? Please describe *Please write legibly – Thank You*

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Section B: INDIVIDUAL PARTICIPATION Continued

B 3 Have you engaged in any professional training, education or certifications related to your role in the SRKW watching industry other than a captain's license? (i.e. naturalist training, Standards of Training Certification and Watchkeeping (STCW)) Please write legibly – Thank You

Answer		
<input type="radio"/>	Yes	if Yes (please describe): <hr/> <hr/>
<input type="radio"/>	No	

B 4 What year did you begin working in the SRKW watching industry? _____

B 5 Since you began working in the SRKW watching industry, how many years have you participated?

(1 year = 1 whale watching season)

_____ # of years

B 6 For the current year (2006) what months did you/will you work in the SKRW watching industry? **(Please mark all that apply)**

Answer	Answer	Answer	Answer
<input type="radio"/> January	<input type="radio"/> April	<input type="radio"/> July	<input type="radio"/> October
<input type="radio"/> February	<input type="radio"/> May	<input type="radio"/> August	<input type="radio"/> November
<input type="radio"/> March	<input type="radio"/> June	<input type="radio"/> September	<input type="radio"/> December
<input type="radio"/> All of the above			

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Section B: INDIVIDUAL PARTICIPATION Continued

B 7 Are these months different from previous years?

Answer		
<input type="radio"/>	Yes	→ GO TO B 7 a
<input type="radio"/>	No	→ GO TO B 8
<input type="radio"/>	N/A	

B 7 a In general, have the months that you worked or intend to work. . .

Answer	
<input type="radio"/>	. . .Increased
<input type="radio"/>	. . .Decreased

Instructions:

For the following questions SRKW watching season is defined as April 15-November.

Low season is April 15-Memorial Day weekend AND After Labor Day to November.

Peak season is Memorial Day weekend-Labor Day weekend.

Off season is November to April 15.

B 8 In a typical week during the SRKW watching season, do you work full time or part time?

Answer	
<input type="radio"/>	Full time (approx. 40 hrs. a week)
<input type="radio"/>	Part Time (less than 40 hrs. week)
<input type="radio"/>	More than full time (over 40 hrs. week)
<input type="radio"/>	Part time during <i>low</i> season, full time during <i>peak</i> season
<input type="radio"/>	Other (<i>please describe</i>)

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**Section B: INDIVIDUAL PARTICIPATION Continued**

B 9 Do you work or volunteer in multiple jobs in any industry (SRKW or other) during the SRKW season?

Answer		
<input type="radio"/>	Yes multiple <i>part time</i> positions	→ GO TO B 9 a & b
<input type="radio"/>	Yes, both <i>full time</i> AND <i>part time</i> positions	
<input type="radio"/>	Yes, multiple <i>full time</i> positions	
<hr/>		
<input type="radio"/>	No, only one <i>part time</i> position	→ GO TO B 10
<input type="radio"/>	No, only one <i>full time</i> position	

B 9 a In what part of the SRKW watching season do you work multiple jobs?
(Please mark all that apply)

Answer	
<input type="radio"/>	Peak season
<input type="radio"/>	Low season

B 9 b What other roles do you occupy during the SRKW watching season?
(Please mark all that apply)

Answer	
<input type="radio"/>	Another SRKW watching boat with the same role
<input type="radio"/>	Another SRKW watching boat with a different role
<input type="radio"/>	Another SRKW watching role entirely
<input type="radio"/>	Another maritime related job
<input type="radio"/>	Another tourism related job
<input type="radio"/>	A paid SRKW position
<input type="radio"/>	A volunteer SRKW position
<input type="radio"/>	Other (<i>please indicate</i>)

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Section B: INDIVIDUAL PARTICIPATION Continued

- B 10** Approximately how many hours a week do you work either paid or volunteer in the following categories ***during*** the SRKW watching season?

Answer in number of hours/week	
Hrs/wk	In the SRKW watching industry
Hrs/wk	In other non whale watching tourism jobs
Hrs/wk	In other non-tourism related jobs

- B 11** Which category best describes your past work history? (**Please mark all that apply**)

Answer	
<input type="radio"/>	Agriculture
<input type="radio"/>	Fishing
<input type="radio"/>	Other natural resources
<input type="radio"/>	Educational services
<input type="radio"/>	Scientific
<input type="radio"/>	Health care and social assistance
<input type="radio"/>	Accommodation and/or food services
<input type="radio"/>	Recreation and or entertainment
<input type="radio"/>	Building trades/construction
<input type="radio"/>	Retail
<input type="radio"/>	Professional
<input type="radio"/>	Public administration
<input type="radio"/>	Other <i>(please indicate)</i>
<input type="radio"/>	No prior work history

- B 12** Do you **still** hold any of the positions or participate in any of the occupations that you indicated in the previous questions, **B 11**?

Answer	
<input type="radio"/>	Yes
<input type="radio"/>	No
<input type="radio"/>	Not applicable

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Section B: INDIVIDUAL PARTICIPATION Continued

B 13 Were you ever involved in any aspect of the maritime industry prior to working in the SRKW watching industry?

Answer		
<input type="radio"/>	Yes	→ GO TO B 13 a
<input type="radio"/>	No	→ GO TO B 14

B 13 a If yes, please provide the following. Please write legibly – Thank You

Maritime Industry type(s) (i.e. fishing, towing, etc)	
Location(s)	
Number of years	

B 14 Do you intend on returning to the SKRW watching industry next year?

Answer		
<input type="radio"/>	Yes	→ GO TO B 14 a
<input type="radio"/>	Undecided	
<input type="radio"/>	No	→ GO TO B 15

B 14 a In what role(s) do you intend to return to next year? **(Please mark all that apply)**

Answer	
<input type="radio"/>	Owner
<input type="radio"/>	Operator/Skipper/Captain
<input type="radio"/>	Engineer
<input type="radio"/>	Deck Hand
<input type="radio"/>	Naturalist
<input type="radio"/>	Assistant/ Jr. Naturalist
<input type="radio"/>	Guide
<input type="radio"/>	Logistics support
<input type="radio"/>	Administrative/Office
<input type="radio"/>	Maintenance
<input type="radio"/>	Volunteer
<input type="radio"/>	Other <i>(please indicate)</i>

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Section B: INDIVIDUAL PARTICIPATION Continued

B 15 Are you interested in owning your own whale watching vessel or company in the future?

Answer	
<input type="radio"/>	Yes
<input type="radio"/>	No
<input type="radio"/>	Possibly
<input type="radio"/>	Already an owner

B 16 In the SRKW off seasons, indicate in the table below what type of work you did in 2005/2006 and expect to do in 2006/2007. Also please specify in what city or place. **(Please mark all that apply)** Please write legibly – Thank You

	2005/2006	2006/2007	City or place
A <i>whale watch</i> industry in a different location	<input type="radio"/>	<input type="radio"/>	
<i>Marine tourism</i> job in the current location	<input type="radio"/>	<input type="radio"/>	N/A
A <i>marine tourism</i> job in a different location	<input type="radio"/>	<input type="radio"/>	
Non <i>marine tourism</i> job in the current location	<input type="radio"/>	<input type="radio"/>	N/A
A non- <i>marine tourism</i> job in a different location	<input type="radio"/>	<input type="radio"/>	
A non- <i>tourism</i> job in the current location	<input type="radio"/>	<input type="radio"/>	N/A
A non- <i>tourism</i> job in a different location	<input type="radio"/>	<input type="radio"/>	
Travel/take time off	<input type="radio"/>	<input type="radio"/>	
Retired	<input type="radio"/>	<input type="radio"/>	
Attend school	<input type="radio"/>	<input type="radio"/>	
Other (<i>please indicate</i>)	<input type="radio"/>	<input type="radio"/>	

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**Section B: INDIVIDUAL PARTICIPATION Continued**

B 17 Below are a few reasons why you may participate in the SRKW watching industry. Indicate the extent you agree or disagree with each statement.
(Please mark one per statement)

A reason to participate in the SRKW watching industry is. . .	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
a). . . to make money	<input type="radio"/>				
b). . . to transition from another maritime position	<input type="radio"/>				
c). . .to work in the region and on the water	<input type="radio"/>				
d). . .to educate the public about SRKW and Puget Sound natural history	<input type="radio"/>				
e). . . to interact with co-workers who share my values	<input type="radio"/>				
f). . . to work outside and "on the water" instead of in the office	<input type="radio"/>				
g). . .to work a seasonal job in the tourism industry	<input type="radio"/>				
h). . . to spend time with the SRKW and other marine animals on a daily basis	<input type="radio"/>				
i). . .other (please indicate)	<input type="radio"/>				

Section B: INDIVIDUAL PARTICIPATION END

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Section C: BUSINESS CHARACTERISTICS: START

Business characteristics describe the business you own or work for. These questions will help us understand what is unique about the business you own or work for in comparison to other SRKW watching businesses and other tourism businesses in general. **Please mark one answer per question unless otherwise directed.**

C 1 Is the vessel(s) which you work on/own, a member(s) of the Whale Watch Operators Association Northwest (WWOANW)?

Answer	
<input type="radio"/>	Yes, we belong to WWOANW
<input type="radio"/>	No, we do not belong to WWOANW
<input type="radio"/>	I work on multiple vessels and some are members and some are not
<input type="radio"/>	Not Applicable
<input type="radio"/>	Don't Know

C 2 If you are an owner of a SRKW watching vessel(s) that currently operates in the industry, please indicate the number of vessels below.

Answer	
	Number of vessels owned
	Number of kayaks owned
<input type="radio"/>	Not applicable/not an owner

C 3 If you are not an owner and work for an SRKW watching company, please indicate the number of vessels which your company currently operates in the SRKW watching industry.

Answer	
	Number of vessels
	Number of kayaks
<input type="radio"/>	Not applicable
<input type="radio"/>	Don't know

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SECTION C: BUSINESS CHARACTERISTICS Continued

C 4 Please indicate how strongly each service matches the tours/trips offered by your company or the company you work for. If you operate multiple tours please indicate all that best apply. **(Please mark one per statement)**

Description of service	Strongly applies	Applies	Occasionally applies	Not applicable
a) Boat-based tours on which viewing the SRKW is the exclusive intent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) Boat-based tours on which the SRKW are a focal point amongst other wildlife	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) Boat-based wildlife tours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) Kayak tours on which the SRKW are a focal point amongst other wildlife	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e) Kayak tours exclusively	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f) Land based whale watching tours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g) Private vessel charter on which whales are occasionally seen but not targeted	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h) Transit service on which whales are occasionally seen.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i) Other <i>(please describe)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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SECTION C: BUSINESS CHARACTERISTICS Continued

C 5 Please estimate what percentage of the vessel's activity is dedicated to SRKW watching trips? **(Please answer for all that apply)**

Answer in %	
Vessel 1	%
Vessel 2	%
Vessel 3	%

C 6 Do you conduct commercial activities or provide additional tourism services other than SRKW watching with your vessel? (For example, transportation, fishing, vessel assist, etc.)

Answer		
<input type="radio"/>	Yes	→ GO TO C 6 a & b
<input type="radio"/>	No	→ GO TO C 7

C 6 a If yes, please describe the service. Please write legibly – Thank You

C 6 b When do you conduct additional activities/services? **(Please mark all that apply)**

Answer	
<input type="radio"/>	during the peak season
<input type="radio"/>	during the low season
<input type="radio"/>	during the off season
<input type="radio"/>	All of the above

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SECTION C: BUSINESS CHARACTERISTICS Continued

C 7 To the best of your ability, please complete the following table to describe the whale watching vessel you own, operate, or work on: **(N/A= for not applicable, UK= for unknown)**. *Please write legibly – Thank You*

Item	Vessel No. 1	Vessel No. 2	Vessel No. 3
OPTIONAL: Vessel name			
a) Home Port/Port of Registration			
b) Operational Port			
c) Vessel Length over all (feet)			
d) Vessel Beam (feet)			
e) Vessel Draft (feet)			
f) Vessel Height from Waterline			
g) Number of Viewing Decks			
h) Height of Viewing Decks from Waterline			
i) Inboard or Outboard Engine			
j) Engine Description (For example, make, horsepower, model, etc.)			
k) Fuel capacity			
l) Vessel Tonnage			
m) Hull Type (mono, dual, rigid hull, etc)			
n) Vessel average operating speed (knots)			
o) Rated Passenger Capacity			
p) Actual/Operational Passenger Capacity			
q) Number of Crew Required (Include Skipper)			
r) Actual Number of Operating Crew (If changes with passenger count please provide range)			

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SECTION C: BUSINESS CHARACTERISTICS Continued

C 8 Please describe the unique characteristics/features of the vessel you own, operate or work on. **(Please mark all that apply)**

Answer	
<input type="radio"/>	Galley
<input type="radio"/>	Restrooms (head)
<input type="radio"/>	Inside seating/viewing
<input type="radio"/>	Outside seating/viewing
<input type="radio"/>	Food which is included with price of tour
<input type="radio"/>	Food for sale
<input type="radio"/>	Spotting network
<input type="radio"/>	Hydrophone
<input type="radio"/>	Binoculars provided
<input type="radio"/>	Underwater viewing camera
<input type="radio"/>	Other <i>(please describe)</i>
<input type="radio"/>	Not applicable

C 9 On average, during the peak, low and off SRKW watching seasons, how many tours do you conduct per day? **(Please indicate average for all vessels)**

Number of tours per boat during the . . .	Quantity
. . .low season	
. . .peak season	
. . .off season	

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SECTION C: BUSINESS CHARACTERISTICS Continued

C 10 Please complete the following table to help describe your tour schedules based on start time: **(Please mark all that apply)** *Please write legibly – Thank You*

Time of Tour Departure		Answer	Length of Tour in hours	Number of Tours
a) Sunrise	Before 8 am	<input type="radio"/>		
b) Morning	8am to 9:59 am	<input type="radio"/>		
c) Mid-Morning	10 am to 11:59am	<input type="radio"/>		
d) Mid- day	Noon to 1:59 pm	<input type="radio"/>		
e) Afternoon	2:00 to 3:59 pm	<input type="radio"/>		
f) Late-afternoon	4:00 to 5:59 pm	<input type="radio"/>		
g) Evening	After 6pm <i>(please indicate time)</i>	<input type="radio"/>		
h) Other	<i>(please describe)</i>	<input type="radio"/>		

C 11 To the best of your ability, please estimate your occupancy rates (in percentage) per season.

Answer in %		
% occupancy	High season	Memorial Day weekend-Labor Day
% occupancy	Low season	April 15-Memorial Day and after Labor Day-October
% occupancy	Off season	November-April 15

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SECTION C: BUSINESS CHARACTERISTICS Continued

C 12 What are the advantages/disadvantages of the type of vessel you own/operate/work/ or volunteer on? Please write legibly – Thank You

C 13 If it were possible, would you change the characteristics of the vessel you work on or own?

Answer		
<input type="radio"/>	Yes	← Go to C 13 a
<input type="radio"/>	No	
<input type="radio"/>	No opinion	← Go to Section D

C 13 a How would you change the characteristics of the vessel you work on? (For example would you increase your speed for greater range, or purchase a vessel with higher viewing platforms for better distance viewing?) Please write legibly – Thank You

SECTION C: BUSINESS CHARACTERISTICS END

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Section D: INDUSTRY TRENDS: START

This section will help us to understand how the U.S. SRKW watching industry is unique. It will help us to understand how the industry has developed and changed over time. **Please mark only one answer per question unless otherwise directed.**

D 1 In your opinion has the general size and type of **vessel** used in the **U.S.** SRKW watching industry changed?

Answer		
<input type="radio"/>	Yes	← Go to D 1 a
<input type="radio"/>	No	← Go to D 2
<input type="radio"/>	No opinion	

D 1 a If yes, how have the **U.S.** SRKW watching **vessels** changed?
(Please mark all that apply)

Answer	
<input type="radio"/>	Larger vessels than previously
<input type="radio"/>	Smaller vessels than previously
<input type="radio"/>	Increased passenger capacity
<input type="radio"/>	Decreased passenger capacity
<input type="radio"/>	Faster vessels
<input type="radio"/>	Slower vessels
<input type="radio"/>	Taller vessels with higher viewing platforms
<input type="radio"/>	Recreational style vessels (i.e. Bayliners)
<input type="radio"/>	Mono-hull
<input type="radio"/>	Multi-hull (i.e. catamarans)
<input type="radio"/>	Rigid hull inflatable
<input type="radio"/>	Other <i>(please describe)</i>

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Section D: INDUSTRY TRENDS Continued

D 2 In your opinion has the **ownership structure** of **U.S.** SRKW vessels changed?

Answer		
<input type="radio"/>	Yes	← Go to D 2 a
<input type="radio"/>	No	← Go to D 3
<input type="radio"/>	No opinion	

D 2 a If yes, how has the ownership structure changed? **(Please mark all that apply)**

Answer	
<input type="radio"/>	New owners are entering the industry with new boats
<input type="radio"/>	New owners are entering the industry with boats already in the SRKW fleet
<input type="radio"/>	Existing owners are absorbing (buying) boats already in the SRKW fleet
<input type="radio"/>	Existing owners are absorbing (buying) companies in the SRKW industry
<input type="radio"/>	Existing owners are buying new boats
<input type="radio"/>	Co-operatives forming (small businesses partnering with each other)
<input type="radio"/>	Small businesses are being absorbed by large businesses
<input type="radio"/>	Small businesses are growing to be larger businesses
<input type="radio"/>	Large businesses are shrinking to be smaller
<input type="radio"/>	Other <i>(please describe)</i>

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Section D: INDUSTRY TRENDS Continued

D 3 In your opinion have owners expanded their operations to include other **SRKW viewing** opportunities?

Answer		
<input type="radio"/>	Yes	← Go to D 3 a
<input type="radio"/>	No	← Go to D 4
<input type="radio"/>	No opinion	

D 3 a If yes, in what ways have owners expanded their operations?
(Please mark all that apply)

Answer	
<input type="radio"/>	Kayaking
<input type="radio"/>	Shore based viewing
<input type="radio"/>	Sea planes
<input type="radio"/>	Other (please describe)

D 4 In your opinion have owners expanded their operations to include **other wildlife viewing** opportunities?

Answer		
<input type="radio"/>	Yes	← Go to D 4 a
<input type="radio"/>	No	← Go to D 5
<input type="radio"/>	No opinion	

D 4 a If yes, in what ways have owners expanded their operations?
(Please mark all that apply)

Answer	
<input type="radio"/>	Other whale species, e.g. gray whale
<input type="radio"/>	Other marine mammals, e.g. seals and sea lions
<input type="radio"/>	Birds
<input type="radio"/>	Other (please describe)

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Section D: INDUSTRY TRENDS Continued

Special Instructions
 In the following **four** questions you will find descriptions of a few changes that **MAY OR MAY NOT** be occurring in the SRKW watching industry. Based on *your own* current knowledge of the industry, please indicate the extent you agree or disagree with each statement. **(Please only mark one per statement)**

D 5 Vessels in the U.S. SRKW watching industry.

“The U.S. SRKW watching industry is in general. . .”	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
a) . . .declining in number of U.S. operated VESSELS	<input type="radio"/>				
b) . . . stable , there are about the same number of U.S. operated VESSELS from year to year	<input type="radio"/>				
c) . . .growing in number of U.S. operated VESSELS	<input type="radio"/>				
d) . . . saturated with no room for more U.S. operated VESSELS	<input type="radio"/>				
e) Other (please indicate)					

D 6 Tourists in the U.S. SRKW watching industry.

“The U.S. SRKW watching industry is in general. . .”	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
a) . . .declining in the number of SRKW watching TOURISTS	<input type="radio"/>				
b) . . . stable about the same number of SRKW watching TOURISTS from year to year	<input type="radio"/>				
c) . . .growing in number of SRKW watching TOURISTS	<input type="radio"/>				
d) . . . saturated with no room for more whale watching TOURISTS	<input type="radio"/>				
e) Other (please indicate)					

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Section D: INDUSTRY TRENDS Continued

D 7 Vessels in the **Non-U.S.** SRKW watching industry.

“The NON-U.S. SRKW watching industry is in general. . .”	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
a) . . .declining in number of Non-U.S. operated VESSELS	<input type="radio"/>				
b) . . . stable , there are about the same number of Non-U.S. operated VESSELS from year to year	<input type="radio"/>				
c) . . .growing in number of Non U.S. operated VESSELS	<input type="radio"/>				
d) . . . saturated with no room for more Non U.S. operated VESSELS	<input type="radio"/>				
e) Other <i>(please indicate)</i>					

D 8 Recreational vessels (privately-owned, not-for-hire) around the SRKWs.

“RECREATIONAL SRKW watching is in general. . .”	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
a) . . .declining in number of recreational VESSELS	<input type="radio"/>				
b) . . . stable , there are about the same number of recreational VESSELS from year to year	<input type="radio"/>				
c) . . .growing in number of recreational VESSELS	<input type="radio"/>				
d) . . . saturated with no room for more recreational VESSELS	<input type="radio"/>				
e) Other <i>(please indicate)</i>					

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Section D: INDUSTRY TRENDS Continued

D 9 In the previous questions we asked about current trends within the industry. Now we would like to know about *your opinions* on the **POTENTIAL FOR GROWTH** within each of the following sectors related to U.S. SRKW watching industry.

Industry segment	Significant room for growth	Some room for growth	Neutral	No room for growth
Gift shops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of tourists	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of whale watching vessels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Longer operating season for whale watching vessels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nature based non whale watching tourism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Non-whale related tourism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other <i>(Please describe)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

D 10 In your opinion are there more tourists participating in the **Non-U.S.** SRKW industry than the U.S. SRKW industry?

Answer	
<input type="radio"/>	Yes
<input type="radio"/>	No
<input type="radio"/>	No opinion

Section D: INDUSTRY TRENDS END

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Section E: EFFECTS ON THE COMMUNITY: START

Communities may be built based on the presence of a specific industry. Changes in the industry may effect or impact the community as a whole. We would like to understand the relationship of the SRKW watching businesses to their specific communities. **Please mark one answer per question unless otherwise directed.**

E 1 Does your household include a spouse, partner, or other family member?

Answer		
<input type="radio"/>	Yes	→ Go to E 1 a
<input type="radio"/>	No	→ Go to E 2

E 1 a Does your spouse, partner, or other family member help you with your SRKW watching business (For example, accounting, marketing, office management, booking, etc.). Please write legibly – Thank You

Answer	
<input type="radio"/>	Yes (please describe)

<input type="radio"/>	No

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**Section E: EFFECTS ON THE COMMUNITY Continued**

- E 2** Do you have any partnerships with any other members of the tourist industry? (For example, other boats, travel agents, chamber of commerce, tourism companies, etc...).
(Please mark all that apply)

Answer		
<input type="radio"/>	Booking Agents	→ GO TO E 2 a
<input type="radio"/>	Chamber of commerce	
<input type="radio"/>	Travel agents	
<input type="radio"/>	Vacation resorts	
<input type="radio"/>	Private marina	
<input type="radio"/>	Other tourism companies	
<input type="radio"/>	Other boats	
<input type="radio"/>	Other <i>(please indicate)</i>	
<input type="radio"/>	None	→ GO TO E 3

- E 2 a** If you do have partnerships where are they located?
(Please mark all that apply)

Answer	
<input type="radio"/>	Local entities – within port of operation
<input type="radio"/>	Regional entities –within the Greater Puget Sound
<input type="radio"/>	Washington State entities
<input type="radio"/>	National entities
<input type="radio"/>	International entities
<input type="radio"/>	Other <i>(please indicate)</i>

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Section E: EFFECTS ON THE COMMUNITY Continued

E 3 In the chart below please indicate which shore support facilities/companies you use for your whale watching and tour operations. **(Please mark all that apply)**

Item	N/A	Vessel 1	Vessel 2	Vessel 3
Food Services (catering)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fuel	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gift Shops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ticketing Kiosk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cleaning Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Office or other Rental Space	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vessel Maintenance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Web/computer services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Graphics/printing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other <i>(please describe)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
None		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

E 4 If you do utilize shore services, please indicate where most services are utilized by providing a percentage by location below:

Answer in %	Location
<input type="radio"/>	Home port of vessel
<input type="radio"/>	Operating port of vessel
<input type="radio"/>	Other <i>(please indicate)</i>
<input type="radio"/>	Do not use any of the above shore support facilities/services

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Section E: EFFECTS ON THE COMMUNITY Continued

E 5 In your opinion, please describe the significance of the SRKW watching industry to the local community in which your business operates. Please write legibly – Thank You

E 6 In your opinion, please describe the significance of the SRKW watching industry to the general public. Please write legibly – Thank You

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