



**NOAA
FISHERIES**

Office of Science
and Technology

Economics and
Social Analysis
Division

Economic Studies of Atlantic HMS Recreational Fisheries

Large Pelagic Survey Data Review Meeting

September 3, 2015

Dr. Clifford Hutt, ECS Federal
in support of NOAA Fisheries

HMS Recreational Economic Studies

2011 HMS Private Angler Expenditure Survey

2013 Charter/Headboat Cost-Earnings Logbook Study

2014/2016 HMS Private Angler Expenditure Surveys

2016 HMS Tournament Survey

HMS Recreational Fishing Expenditure Survey

- Mail survey conducted in 2011 of HMS Angling permit holders from Maine to North Carolina
 - Conducted in 2 month waves starting in May
 - 57% response rate (2,025 out of 3,796)
- Collected expenditure data on each angler's:
 - Most recent Atlantic HMS fishing trip
 - Durable goods purchased in last 12 months adjusted for percent trips targeting Atlantic HMS

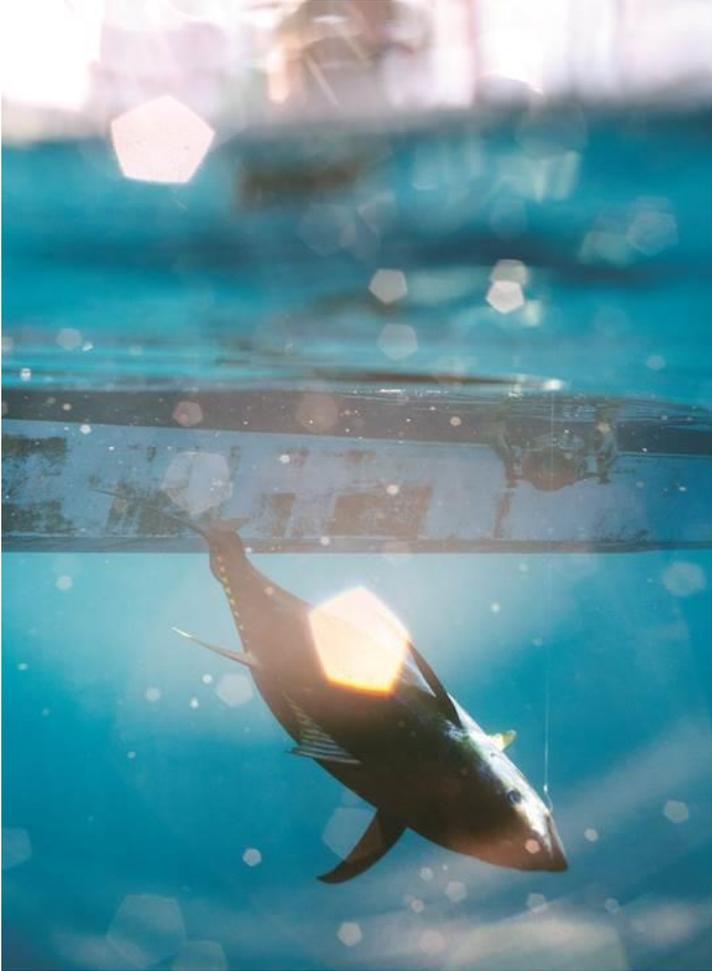
HMS Recreational Fishing Expenditure Survey

- Trip Expenditures
 - Auto fuel and rental
 - Boat fuel and rental
 - Food and drink
 - Parking
 - Bait and ice
 - Lodging
 - Guide/charter fees
 - Fish processing fees
 - Tournament fees
 - Gifts
- Durables Expenditures
 - Rods and reels
 - Tackle and gear
 - Boat expenses
 - Truck expenses
 - Insurance
 - Fishing licenses
 - Special clothing
 - Subscriptions
 - Second home for fishing
 - Taxidermy

HMS Recreational Fishing Expenditure Survey

- Expenditures (ME to NC) used to estimate total economic impact and employment in IMPLAN
- Total Output = gross value of sales by businesses within the economic region
- Labor income = personal and proprietor's income
- Employment = full and part-time jobs

Tuna Trip Expenditures and Impacts



Mean Trip Expenditure	\$534 per day
Tuna Trips	27,648
Total Expenditures	\$14.8 million
Total Impacts	\$19.9 million
Labor Impacts	\$6.6 million
Employment	136 jobs

Billfish Trip Expenditures and Impacts



Mean Trip Expenditure	\$900 per day
Billfish Trips	5,123
Total Expenditures	\$4.6 million
Total Impacts	\$6.0 million
Labor Impacts	\$2.0 million
Employment	39 jobs

Shark Trip Expenditures and Impacts



Mean Expenditure	\$567 per day
Shark Trips	6,669
Total Expenditures	\$3.8 million
Total Impacts	\$5.4 million
Labor Impacts	\$1.8 million
Employment	41 jobs

HMS Durable Expenditures and Impacts



Mean Trip Expenditure	\$5,516 year
HMS Permit Holders	13,836
Total Expenditures	\$76.3 million
Total Impacts	\$115.8 million
Labor Impacts	\$38.7 million
Employment	727 jobs

HMS Recreational Fishing Expenditure Survey

Economic Impact of HMS Durable & Trip Expenditures (ME to NC)

	Total Exp	Total Impact	Jobs
Tuna Trips	\$14.8 million	\$19.9 million	136
Billfish Trips	\$4.6 million	\$6.0 million	39
Shark Trips	\$3.8 million	\$5.4 million	46
Durable Goods	\$76.3 million	\$115.8 million	727
Total	\$99.5 million	\$147.2 million	943

Expenditures represent estimates for private HMS boat trips only, and do not represent for-hire or tournament trips for HMS.

HMS Recreational Fishing Expenditure Survey

Final report released in November 2014

<http://www.st.nmfs.noaa.gov/economics/fisheries/recreational/angler-expenditures-economic-impacts/angling-expenditure-report-2011>

HMS Charter/Headboat Cost-Earnings Study



HMS Charter/Headboat Cost-Earnings Study

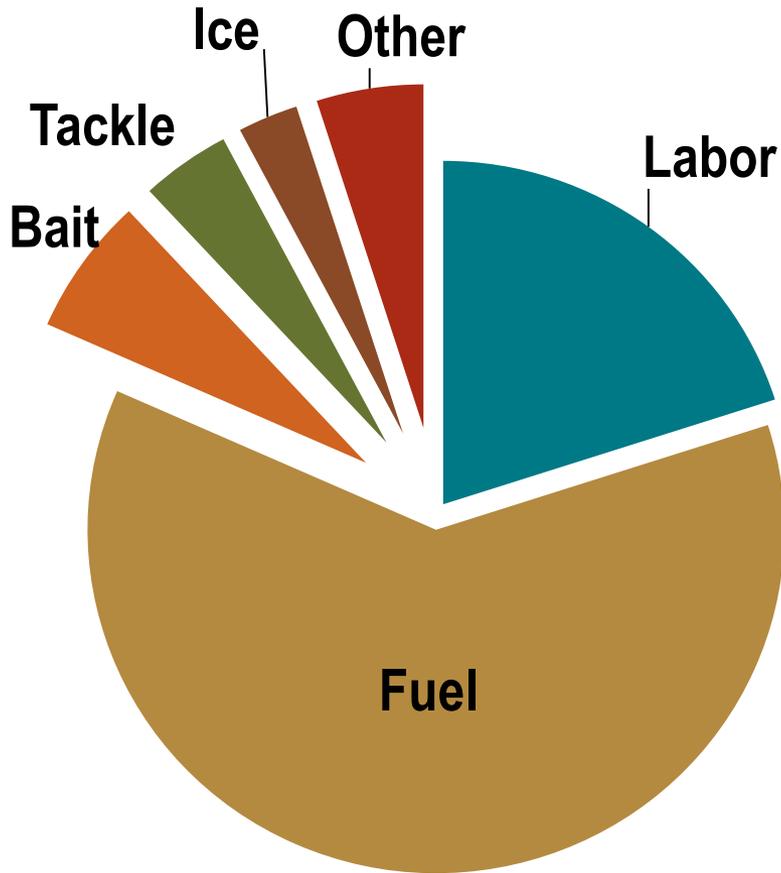
- Conducted logbook study of HMS CHB permit holders from July – November 2013
- Received trip forms on 536 trips targeting HMS
- Majority (79%) from Southeast Region (NC – TX)

Region	Frequency	Percent
South Atlantic (NC – FL)	297	55.4
Gulf of Mexico (FL – TX)	126	23.5
Northeast (ME – VA)	113	21.1

HMS Charter/Headboat Cost-Earnings Study

Variable	Northeast	S. Atlantic	Gulf of Mex.
Trip Length (h)	11	8	7
Anglers per party	4.6	5.2	4.6
Target species (%)			
Yellowfin Tuna	57	44	35
Sharks	34	30	64
Bluefin Tuna	35	3	--
Marlin	14	40	23
Sailfish	0	56	14

Average HMS Charter Trip Costs



Total Cost Breakdown

Category	Average (\$)
Total Fare	\$2,062
Trip Costs	\$1,251
Fuel	\$770
Labor*	\$251
Bait	\$81
Tackle	\$52
Ice	\$35
Other	\$62

* Labor = Crew + Captain (if not owner)

Average HMS Charter Trip Costs by Region

Category	Northeast	S. Atlantic	Gulf of Mex.	Average
Total Fare	\$2,450	\$1,223	\$2,111	\$2,062
Trip Costs	\$1,482	\$695	\$1,083	\$1,251
Fuel	\$967	\$376	\$631	\$770
Labor*	\$253	\$200	\$225	\$251
Bait	\$129	\$46	\$70	\$81
Tackle	\$61	\$38	\$58	\$52
Ice	\$56	\$14	\$43	\$35
Other	\$16	\$22	\$55	\$62

* Labor = Crew + Captain (if not owner)

HMS Charter/Headboat Cost-Earnings Study

- Report will be submitted for SF Tech Memo review and publication later this month
- Awaiting updated LPS for-hire trip estimate
- Future study will be needed to assess annual costs of HMS for-hire operators

Ongoing and Future Projects



Ongoing and Future Projects

- HMS Private Angler Expenditures
 - Surveyed for durable good expenditures in 2014
 - Trip expenditures survey scheduled for 2017
- HMS Tournament Expenditure Survey in 2016
- VIMS study of BFT anglers and for-hire captains
 - Private angler stated preferences and WTP
 - For-hire captain behavior and decision making regarding choice to fish recreationally or commercially
 - Andrew Scheld and William Goldsmith