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The role of recreational charter boats in coastal communities: an economic and social analysis in Oregon and Washington

Jerry Leonard
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Charter Vessel Survey

- Cost earnings survey of WA and OR recreational charter fleet.
 - Estimate economic contribution of charter fleet
 - Gain insights into the structure, perceptions, and economic conditions
 - Vessel characteristics
 - Years participating
 - Share of household income
 - Concerns for future

Study Details – Methods, Data, Dates, etc.

- 217 Washington and Oregon marine vessels in 2006 with \$15.4 million in direct revenue.
- Mail survey to all charter fishing license holders (marine or not).
- Completed surveys were received from 95 ocean going vessels (41% response rate).

Data Description

- Only census of entire charter fleet in WA and OR.
- Detailed revenue data that includes revenue not earned from for-hire fishing.
- Opinion data of operators on current economic conditions and economic outlook.

Management Needs

- Results used in calculation of economic impact of groundfish management alternatives by Pacific States Marine Fisheries Council
- Will be used by Council in calculation of recreational salmon management alternatives.
- Insights on structure and economic conditions could be important for allocation decisions.

Table 5. Mean Revenue by Source in Washington and Oregon (\$2006)

Revenue Source	N	Mean	Standard Deviation
Vessel Related Revenue			
Salmon Fishing	64	24,897	30,849
Groundfish Fishing	64	13,982	27,110
Halibut Fishing	64	7,432	18,822
Commercial Fishing	64	5,748	26,008
Other Recreational Fishing	64	4,552	21,179
Albacore Fishing	64	3,650	9,958
Shellfish Fishing	64	252	1,248
Other Large Pelagic Fishing	64	168	813
Nature Watching	64	150	825
Non-Fishing Scuba Diving	64	117	595
Freelance Fishing	64	107	855
Burial at Sea	64	89	199
Other Purpose 1	64	3,524	10,967
Other Purpose 2	64	2,621	13,098
Other Revenue			
Booking Revenue	64	2,367	13,777
Hotel Owned by Vessel Owner	64	469	2,403
Souvenir Sales	64	162	767
Food/Beverage Sales	64	144	1,010
Renting of Vessel	64	119	547
Other Sales	64	26	171
Total Revenue	64	70,575	95,945

Table 6. Mean Expenditures by Type in Washington and Oregon (\$2006)

Expenditure Type	N	Mean	Standard Deviation
Vessel Related Expenditures			
Captain's Payments	70	5,693	12,501
Other Crew Payments	70	2,319	4,154
Office Labor and Other Labor	70	690	2,506
Engine Overhaul	70	2,512	10,291
All Other Vessel Maintenance	70	2,624	3,004
Electronics Maintenance	70	537	1,093
Haulout	70	965	2,429
Moorage	70	1,356	1,299
Purchase of New Gear	70	1,276	2,611
Vessel Insurance	70	3,569	3,605
Vessel Professional Services	70	413	644
Vessel Advertising	70	1,345	2,240
Fuel	70	7,685	8,910
Fishing Supplies	70	2,050	3,468
Bait Expenses	70	807	1,589
Food and Drink	70	88	257
Taxes and Government Fees Domestic	70	4,172	9,251
Taxes and Government Fees Foreign	70	32	171
Commissions for Booking Agents	70	3,906	7,730
Telephone and Other Communications	70	718	981
Other Vessel Related	70	5,434	14,699
Total Expenditures	70	50,547	63,228

Contribution Estimates

WA and OR	Contribution			Total
	Direct	Indirect	Induced	
Industry Output	\$15,314,853	\$5,839,016	\$7,956,041	\$29,109,910
Income	\$2,802,449	\$1,323,484	\$1,968,847	\$13,479,785
Employment	345	43	76	465
"Economic Contribution of Marine Angler Expenditures"				
Industry Output	\$12,318,000			\$20,722,000
Income	\$4,012,000			\$6,752,000
Employment	185			260

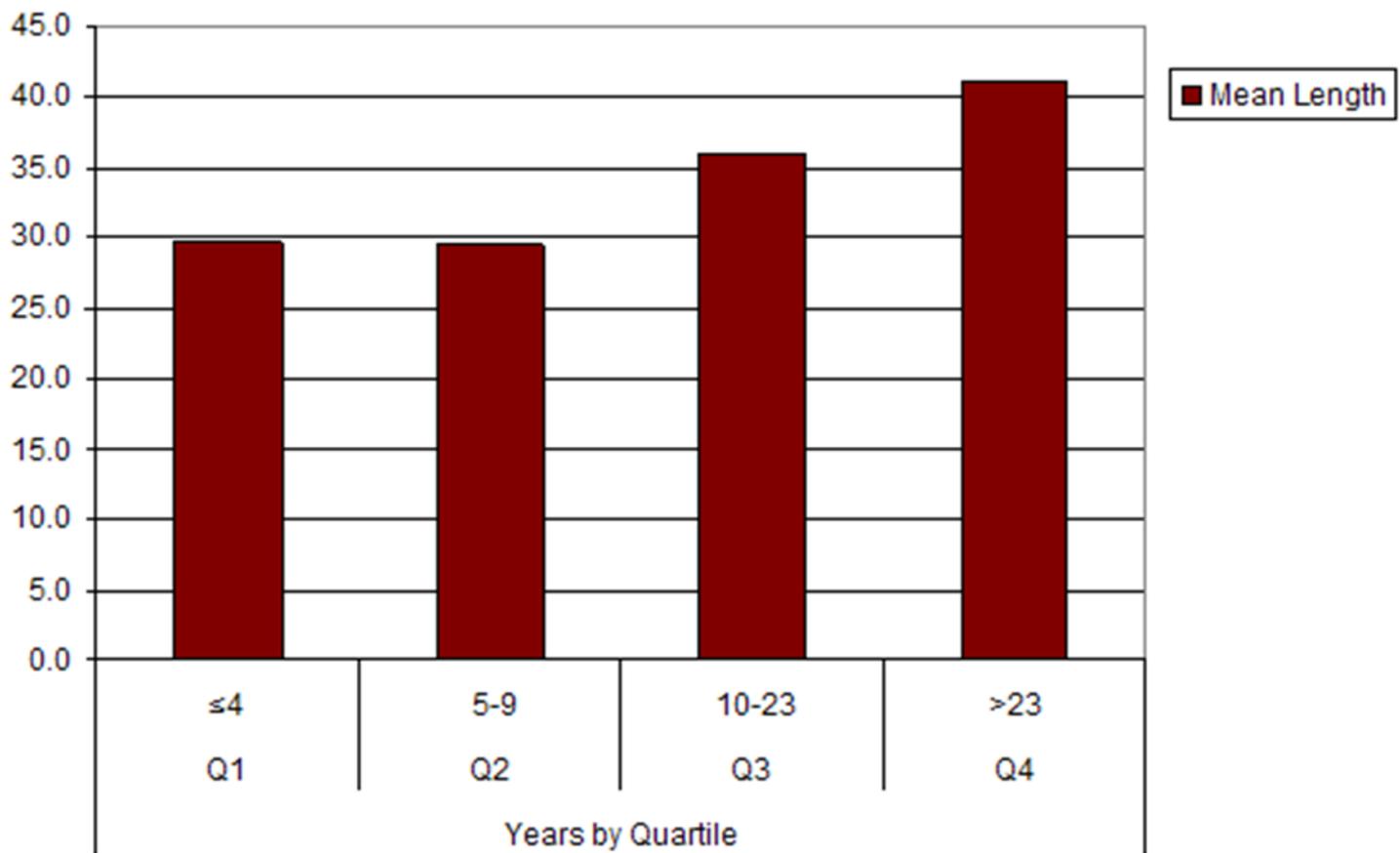
Outlook Opinion

Table 11. Clients Serviced By Economic Outlook

Clients		Outlook		Total
		Favorable	Unfavorable	
More	Frequency	10	7	17
	Percent of Total	17.2%	12.1%	29.3%
About the Same	Frequency	3	6	9
	Percent of Total	5.2%	10.3%	15.5%
Fewer	Frequency	5	27	32
	Percent of Total	8.6%	46.6%	55.2%
Total	Frequency	18	40	58
	Percent of Total	31.0%	69.0%	100.0%

$\chi^2 = 9.71$, degrees of freedom 2, significance level < 1%

Figure 3. Years of Ownership by Mean Length of Vessel



Outlook Opinion

Economic Outlook Over Next Five Years

Variable	Favorable		Unfavorable	
	Mean	Std. Dev.	Mean	Std. Dev.
Years Owned Charter Operation	9.6*	8.4	16.1	12.1
Years Involved in Industry	14.5**	10.9	21.6	13.8
Vessel Length	30.7**	9.5	35.9	10.5
Vessel Main Engine Horsepower	263.6*	120.9	375.7	244.6
Total Vessel Expenditures	29,239*	20,683	57,065	63,999
Fuel	5,683**	4,835	9,704	10,951
Commissions for Booking Agents	1,500*	4,107	6,809	14,182
Captain's Payments	1,151**	2,402	3,025	4,785
Other Crew Payments	1,361*	2,584	5,767	12,748
Other Vessel Related Expenses	302*	617	5,939	9,413
Total Vessel Revenue	64,946	76,725	71,109	90,811

*Different from mean of "Unfavorable" at a 0.05 level of significance.

**Different from mean of "Unfavorable" at a 0.1 level of significance.