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Atlantic HMS

Atlantic HMS Recreational Economic Surveys

HMS Tournament Survey

HMS Trip Expenditure Survey

Atlantic HMS Advisory Panel Spring Meeting

March 8, 2018

Outline

- HMS Tournament Study
 - Operator revenue
 - Operator costs & earnings
 - Participant expenditures
- HMS Angling Trip Expenditures
- Economic Impact Analyses
- **All results are preliminary**

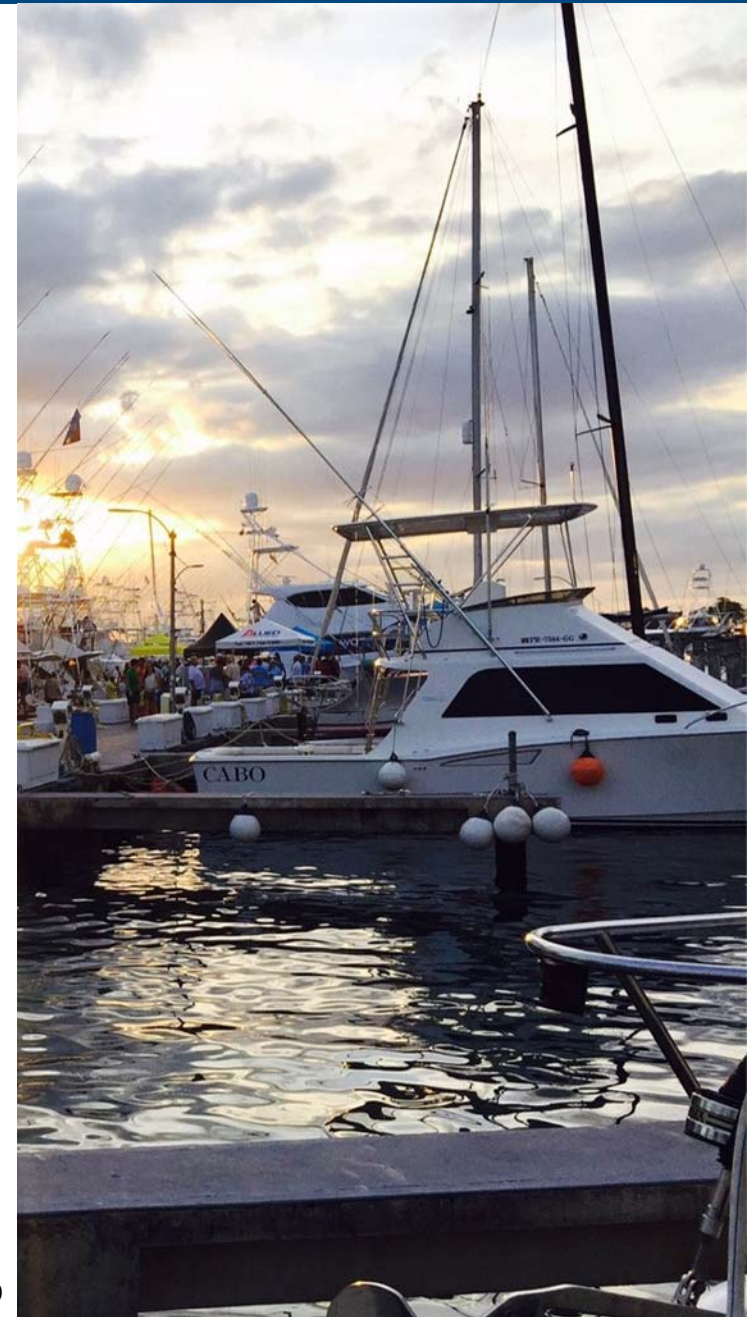


Photo by Randy Blankinship

HMS Tournament Study

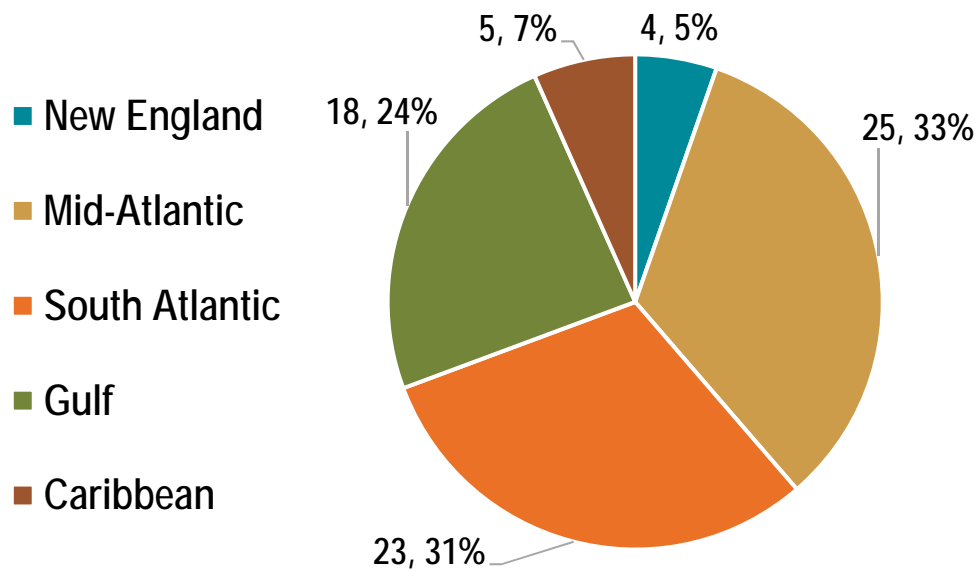
- Goal: Quantify the economic activity and impacts of HMS tournament operations and participants in 2016
- Operator survey sent to 218 NMFS-registered Atlantic HMS tournament operators in 2016 and early 2017
- Participant survey fliers sent to 94 tournaments



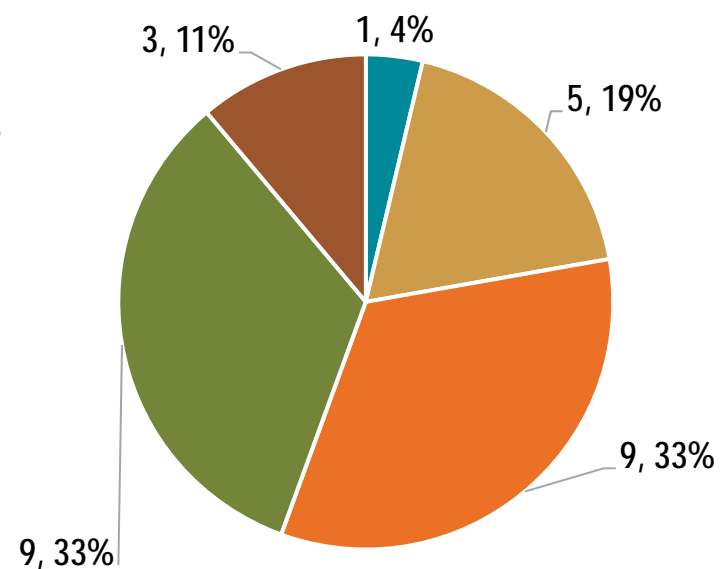
Photo by Dr. John Graves

HMS Tournament Responses by Region

75 Tournaments Returned
Operator Survey (36%)



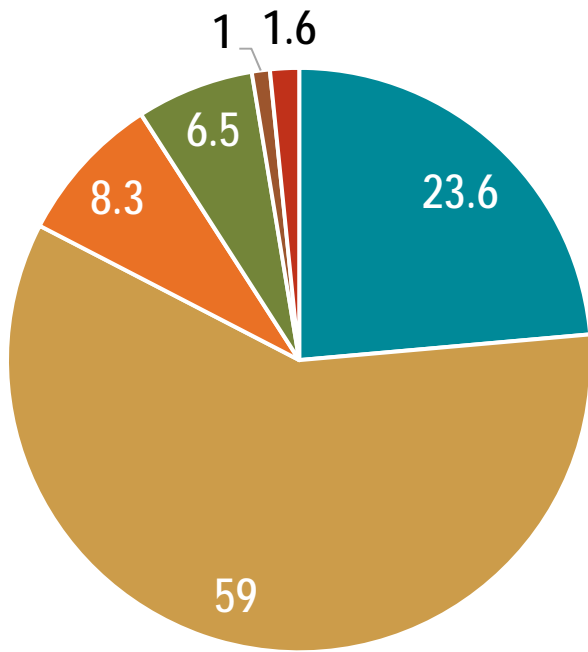
27 Tournaments Returned
Participant Surveys (29%)



Top target species were blue marlin (61%), white marlin (60%), and yellowfin tuna (55%)

Tournament Operator Sources of Revenue

Revenue Sources (%)



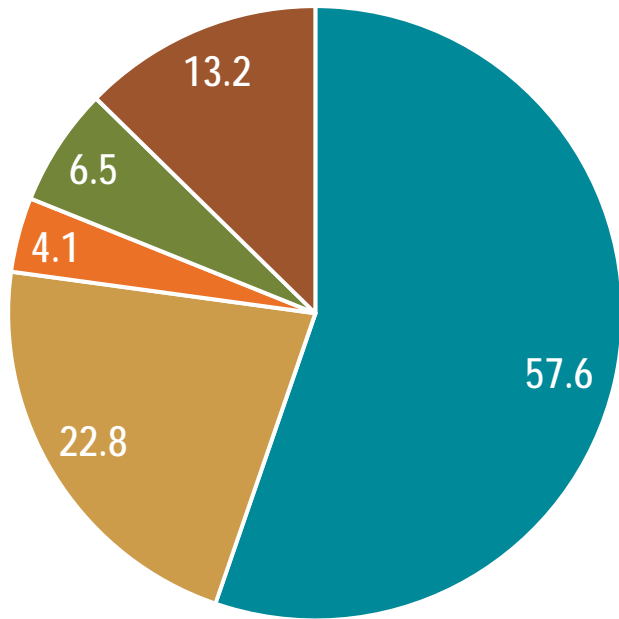
- Registration
- Sponsors
- Concessions
- Optional fees
- Merchandise
- Other

Item	Average	Total
Registration	\$41,454	\$9,078,000
Optional fees	\$103,506	\$22,668,000
Sponsors	\$14,583	\$3,194,000
Merchandise	\$11,384	\$2,493,000
Concessions	\$1,738	\$380,000
Other Revenue	\$2,803	\$614,000
Total	\$175,468	\$38,427,000

Total = Average x 220 Tournaments

Tournament Operator Costs and Earnings

Costs and Earnings (%)

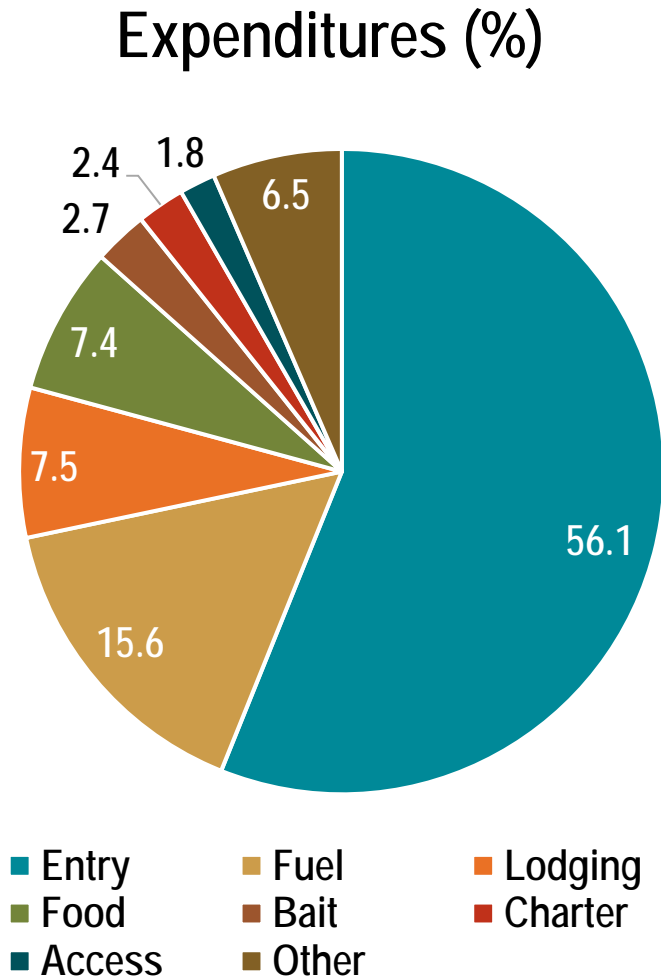


- Monetary Prizes
- Earnings
- Operation Costs
- Charitable Donations
- Labor

Item	Average	Total
Prizes	\$100,991	\$22,117,000
Merchandise	\$16,971	\$3,717,000
Other Costs	\$22,975	\$5,032,000
Labor	\$7,128	\$1,561,000
Charitable Donations	\$11,357 (\$17,626)	\$2,487,000 (\$3,860,000)
Net Earnings	\$16,046	\$3,514,000

Total = Average x 220 Tournaments

Tournament Participating Team Expenditures



Item	Average	Total
Entry fees	\$7,501	\$48,055,000
Boat fuel	\$2,079	\$13,322,000
Lodging	\$998	\$6,391,000
Food	\$993	\$6,360,000
Bait	\$367	\$2,352,000
Charter fees	\$315	\$2,021,000
Other expenses	\$1,108	\$7,099,000
Total	\$13,361	\$85,900,000

Total expenditures = Average x 7,304 teams

2016 HMS Angling Trip Expenditure Survey

- Goal: Quantify the economic expenditures and impacts of HMS Angling permit holders from Maine to Texas
- Conducted in 2 month waves throughout 2016
 - Southeast (NC-TX) sampled Jan-Dec
 - Greater Atlantic (ME-VA) sampled May-October
 - 4,837 surveys sent by mail and email
- 1,784 completed returns for 37% response rate

2016 HMS Angler Responses by Region & Species

Region	Sampled Trips
New England	356 (20%)
Mid-Atlantic	507 (28%)
South Atlantic	432 (24%)
Gulf of Mexico	489 (27%)

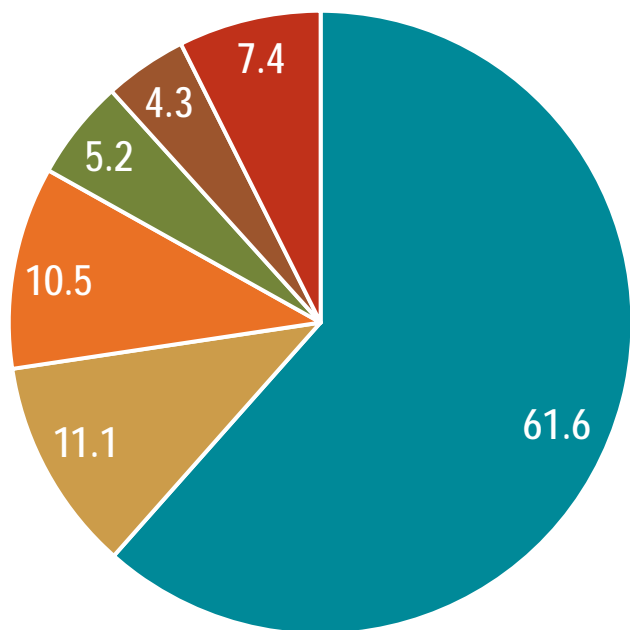
Primary Target Species	Sampled Trips
Tuna	947 (53%)
Billfish	197 (11%)
Sharks	141 (8%)
Swordfish	61 (3%)
Non-HMS	155 (9%)
Unspecified	270 (15%)



Photo by Randy Blankinship

2016 HMS Angling Trip Expenditures

Expenditures (%)



- Fuel
- Groceries
- Ice
- Bait
- Restaurants
- Other

Item	Average	Total
Fuel	\$419.74	\$28,739,000
Bait	\$76.60	\$5,176,000
Groceries	\$71.37	\$4,887,000
Restaurants	\$35.66	\$2,442,000
Ice	\$29.22	\$2,001,000
Other	\$50.12	\$3,376,000
Total	\$682.71	\$46,675,000

Total Expenditures = Average x 68,468 non-tournament trips

Economic Contributions of HMS Tournaments and Non-Tournament Angling Trips

- Expenditures (Maine to Texas) associated with HMS tournaments and angling trips were used to estimate total economic output, labor income, and employment in IMPLAN
- Total Output = Gross value of sales by businesses within the economic region that are supported by expenditures either directly or indirectly. Includes labor income.
- Labor income = personal and proprietor's income supported by expenditures
- Employment = full and part time jobs supported by expenditures

Economic Impacts of HMS Tournaments and Non-Tournament Angling Trips

- Economic impact analysis conducted in IMPLAN by assigning expenditures to economic sectors in a national model
- * Tournament analysis excludes prize payout as it is a “transfer payment”

	Tournament Operators	Tournament Participants	HMS Angling Day Trips
Total Events	220 Tournaments	7,304 Teams	68,468 Trips
Total Expenditures	\$21,732,000*	\$37,845,000*	\$46,675,000
Economic Impacts			
Employment	288	581	500
Labor Income	\$14,503,000	\$27,650,000	\$26,686,000
Total Output	\$42,018,000	\$92,854,000	\$95,626,000
Avg Output/Event	\$190,990	\$12,713	\$1,397

Comments and Questions

