Angler Spending on Fishing-related Durable Goods: Results from the 2014 Marine Recreational Fishing Expenditure Survey

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Outline

2014 National Expenditure Survey

- Sample frame and methods
- Response Rates and Demographics
- Some Survey Results

Next Steps
### NOAA Fisheries Angler Expenditure Surveys

#### Data collected:
- Expenditures on fishing trips and fishing-related durable equipment
- Spending on different types of fishing (shore, private boat, for-hire)
- Spending by residents and non-residents of a state

#### Methods of collection:
- In-person interviews
- Mail

#### Frequency:
- Every 3-5 years, since 2006
- Nationwide – all coastal states
2014 National Marine Recreational Fishing Expenditure Survey

- Survey focused on durable equipment expenditures only, no trip expenses
- 32 annual categories:
  - Tackle, rods and reels, other gear
  - Camping equipment, clothing, binoculars
  - Taxidermy
  - Magazine subscriptions
  - Club Dues
  - License fees
  - Boat purchases, boat accessories, and related expenses
  - Vehicle purchases and related expenses
  - Second home purchases and related expenses
Target Population

- Saltwater anglers who went fishing in past 12 months in all coastal states except Hawaii
- License frame sample only – no pre-screening intercepts or phone calls
  - Used licenses that allowed for saltwater fishing during 12 months prior to survey
    - Saltwater only
    - Saltwater combo licenses (e.g., freshwater, lifetime, senior, military, hunting/fishing)
Sampling Frame

• Sample drawn from state license frames, stratified on resident status

• Proportional sampling by type of license within a strata (e.g. annual saltwater, annual combo, daily saltwater, daily combo)

• To try and capture more saltwater anglers in states with combination licenses, coastal counties were oversampled (TX, FL) or only licenses purchased in a coastal county were used (CA, OR)
Survey Methods

• Followed modified Dillman method

• 103,993 surveys mailed in total; 7,832 were not delivered to right person/address or returned by USPS
Response Rates by State

10,809 surveys returned, nationwide response rate = 11%
Additional Information Collected

Number of days fished in state in past 12 months
Gender, Race, Ethnicity, and Age
Years of fishing
Household income and Education

San Diego, CA – CPFV boats
## Angler Demographics

<table>
<thead>
<tr>
<th>Variable</th>
<th>Mean</th>
<th>Std Error</th>
</tr>
</thead>
<tbody>
<tr>
<td>Days fished in past 12 months</td>
<td>27.8</td>
<td>0.66</td>
</tr>
<tr>
<td>Percent Male</td>
<td>85.5%</td>
<td>NA</td>
</tr>
<tr>
<td>Age</td>
<td>53.5</td>
<td>1.31</td>
</tr>
<tr>
<td>Years of saltwater fishing</td>
<td>31.5</td>
<td>0.26</td>
</tr>
<tr>
<td>Hours worked per week</td>
<td>29.9</td>
<td>0.30</td>
</tr>
</tbody>
</table>
Angler Household Income

Percent of anglers in each income category

- < $20,000: 7%
- $20,000-$39,999: 13%
- $40,000-$59,999: 15%
- $60,000-$79,999: 16%
- $80,000-$99,999: 14%
- $100,000-$149,999: 8%
- $150,000-$199,999: 9%
- $200,000 or more: 19%
Angler Education Levels

- 12th grade or less (7.4%)
- High school graduate or GED (21.7%)
- Associate or technical school degree or college coursework (27.3%)
- Bachelor’s degree (25.5%)
- Advanced, professional or doctoral degree or coursework (18.1%)
Average U.S. Expenditures – Light Equipment and Fishing-Related Gear

- Rods & Reels: $226.09
- Tackle: $171.15
- Clothing: $71.40
- Camping Equipment: $43.52
- License Fees: $35.67
- Club Dues: $17.00
- Binoculars: $14.61
- Magazine Subscriptions: $13.86
- Taxidermy: $9.98
Average Expenditure on Tackle and Related Gear

Mean over all anglers, resident and non-resident
Resident Spending on Rods, Reels and Poles – North Carolina, 2011 vs 2014

- **2011**
  - Mean = $114

- **2014**
  - Mean = $132

Zeros excluded. Expenditures restricted <= 4000
Boat-Related Expenditures – U.S. Averages

- New Boat Purchase: $530.87
- Used Boat Purchase: $380.81
- Boat Maintenance: $221.00
- Boat Storage: $169.26
- New Accessory Purchase: $159.27
- Boat Insurance: $106.14
- Boat Registration: $27.15
- New Canoe Purchase: $26.48
- Used Accessory Purchase: $21.65
- Boat Purchase Fees: $12.58
- Used Canoe Purchase: $10.65
Next Steps: Economic Impact Analysis

Analysis at state and national level

- Use data on number of anglers from MRIP and state estimates (CA, OR, WA, AK, TX) to estimate total expenditures
- Will use IMPLAN (version 3, 2012 release) which has 432 business sectors in each county in the U.S.
- Analyze sales impacts, jobs supported, contribution to GDP, and income
In Summary

- U.S. saltwater anglers spent on average $2,863 on durable goods in 2014.
- Boat expenditures overall account for largest share of average expenditures.
- Economic impact estimates expected fall 2015.
Questions?

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