Saltwater recreational fishing generates a total economic impact of $160 million;

Direct expenditures by recreational saltwater anglers total $70 million a year, more than $26 million higher than the landed value of commercial fisheries in RI;

More than $24 million in wages and 1,000 jobs are tied directly to saltwater recreational fishing;

Saltwater recreational fishing is the state’s 8th largest tourism attraction;

Saltwater recreational fishing is one of the most important outdoor recreational amenities for Rhode Islanders’;

Saltwater fishing is the most prevalent activity among boaters in RI;

More than 50% of saltwater anglers in RI waters are from out-of-state;
Summary

Recreational saltwater angling is an important contributor to the state’s economy

Total impact is an estimated $160 million
Recreational saltwater angling directly generates approximately $70 million a year in direct economic activity
An estimated $90 million in indirect impact is also generated

Recreational saltwater angling is an important component of RI’s tourism offering

Saltwater angling is the 8th largest tourist attraction in RI
More than ½ of anglers are from out-of-state
A large percentage of seasonal residents, potentially as much as ½, participate in saltwater fishing

Definition of acronyms used in this report

- RIDEM SCORP: RI Department of Environmental Management State Comprehensive Outdoor Recreation Plan
- USCG: US Coast Guard
- RISAA: RI Saltwater Anglers Association
- USFW: US Fish and Wildlife Service
- NMFS: National Marine Fisheries Service
- NSGA: National Sporting Goods Association
- ASA: American Sportsfishing Association
- NP: Ninigret Partners

Sources Consulted for this Project

Reports & Publications
- “Economic Importance of Marine Angler Expenditures in RI” – NOAA, 2004
- NSGA Sports Participation Survey, 2005
- “Sportsfishing in America” - ASA, 2002
- “Public Access to Shoreline Recreational Fishing in Narragansett Bay” – RIDEM, 2005
- “Economics of Recreational and Commercial Striped Bass Fishing” – Stripers Forever, 2005
- “RI Travel and Tourism Report” – URI Office of Travel, Tourism and Recreation, 2005
- “Outdoor Recreation Demand Citizen Survey” – RIDEM, 2003

Other Sources
- Dun and Bradstreet Industry Reports
- RI Department of Employment & Training, ES202 wage and employment data
- RI State Budget Office, Sales & Hotel Tax Collections
- Claritas Retail Sales database

Primary Research
- 2 Fishing distributor interviews
- 5 Bait and Tackle shop interviews
- 2 sporting good store managers
- 2 Fishing Charter captain interviews
- 2 Marina operator interviews
- Web and Mail Survey of Charter Boat Captains (14 responses)
- Intercept Survey of Anglers (268 interviews)

Note: Due to the proprietary nature of some of the information presented, the specific participants are kept confidential at their request
Rhode Island Industry Trends

Saltwater fishing is a significant source of recreation for a large percentage of RI'ers...

... And may even be larger since it is the dominant activity for boaters in RI waters
There is some disagreement regarding the number of saltwater anglers in Rhode Island. For purposes of this study, the average of these studies will be used: 182,000 saltwater anglers.

**Estimates of Saltwater Anglers in RI Waters (000)**

- NSGA: 40
- USFWS: 86, 93
- MRFSS: 124, 227

Saltwater recreational fishing generates significant out-of-state activity.

**% of Saltwater Anglers from Out-of-State**

- RISAA: 55%
- USFW: 52%
- NMFS: 64%
On average, anglers fish in RI waters a minimum of 10 times per year with a high probability that the number of trips is closer to 16. For purposes of this study, the simple average (16) of all these studies are used herein.

Estimated Mean Numbers of Days Fishing in RI

- ASA: 10
- RISAA: 20
- RIDEM: 19
- NSGA: 14
- USFW: 16

... with a high likelihood that most of the activity corresponds to the summer season rather than prime fishing season.

A number of RI's specialty tackle shops are closed during January and February.
Estimated Economic Impact
Anglers spend approximately $70 million a year in Rhode Island

SALTWATER ANGLER EXPENDITURES

- Boat Sales
- Charter Fees
- Travel Expenses
- Boating Expenses
- Bait & Equipment
- Tourneys & Dues

Discussion
- Estimates are sales data at “retail” for RI-based spending only
- Boat sales estimates are based on boats classified as targeted to fishing only and not other boats such as sailboats and cruisers

This estimate falls within the range of other economic studies of saltwater fishing over the last several years

<table>
<thead>
<tr>
<th>STUDY</th>
<th>NO. OF ANGLERS</th>
<th>R.I. DIRECT EXPENDITURES</th>
<th>INFLATION ADJ. TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Sportfishing Association (2003)</td>
<td>No estimate</td>
<td>Fishing related gear: Travel related: Total:</td>
<td>$89.2 M</td>
</tr>
</tbody>
</table>

- No estimate

US Fish and Wildlife Service (2001):
- In-state: 67K
- Out-of-state: 82K
- Fishing related gear: $15.9 M
- Travel related: $19.1 M
- Boating costs: $22.0 M
- Total: $57.0 M

National Marine Fisheries Service (2004):
- In-state: 124K
- Out-of-state: 227K
- Fishing related gear: $33.8 M
- Travel related: $33.3 M
- Boating costs: $7.7 M
- Total: $74.8 M

American Sportfishing Association (2003):
- No estimate
- Fishing related gear: Travel related: Total: $85 M

- No estimate
Saltwater fishing generates at least 1,000 direct jobs and approximately $24 million in annual wages.

Estimated Annual Direct Employment:
- Charter: 177
- Hospitality: 230
- Boating Services: 470
- Bait & Equipment: 153

Estimated Wages ($millions):
- Charter: $10.3
- Hospitality: $9.3
- Boating Services: $2.8
- Bait & Equipment: $1.2

Note 1: Wage and employment estimates are based on an allocation methodology based on estimated contribution of saltwater fishing to the overall activity.

Note 2: Charter wages are difficult to estimate due to their economic structure as privately-held businesses.

Total economic impact is nearly $160 million:
- Direct Expenditures: $69.4 Million
- Indirect & Induced Expenditures: $90.2 Million
- Combined Impacts: $159.6 Million

Note: Prior work done on the tourism economy by University of Rhode Island has demonstrated a multiplier of 1.3. This multiplier is used for purposes of this study.
Recreational saltwater fishing as a tourist attraction ranks in the top ten activities in Rhode Island.

**Tourist and Cultural Attraction Attendance**

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Attendance (000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Providence Children’s Museum</td>
<td>122</td>
</tr>
<tr>
<td>Trinity Repertory Company</td>
<td>151</td>
</tr>
<tr>
<td>Saltwater Fishing</td>
<td>182</td>
</tr>
<tr>
<td>Providence Performing Arts Center</td>
<td>385</td>
</tr>
<tr>
<td>Newport Grand</td>
<td>510</td>
</tr>
<tr>
<td>Roger Williams Park Zoo</td>
<td>570</td>
</tr>
<tr>
<td>Preservation Society of Newport County</td>
<td>699</td>
</tr>
<tr>
<td>WaterFire Providence</td>
<td>1,100</td>
</tr>
<tr>
<td>Lincoln Park</td>
<td>3,650</td>
</tr>
</tbody>
</table>

**DISCUSSION**

Recreational fishing clearly ranks in the top ten of tourism and cultural activities in Rhode Island:

- Conservatively it places 8th.
- Based on MFRSS it ranks 8th.
- Using trips as an equivalent measure to attendance at an estimated 1.4 million trips, it ranks second only to Lincoln Park.

Source: Providence Business News Book of Lists & NP analysis

...And is likely an important spending driver for a key segment of the state’s tourism economy.

- Campers/Boaters and House and Cottage Renters represent 13% of total estimated visitor spending and approximately $300 million of the state’s tourism economy.
- Based on our survey findings, it is estimated that a significant portion (more than 50%) participate in saltwater angling while in Rhode Island.

Therefore, as much as $34 million or 10% of tourism-related spending in this market segment could be attributable to saltwater fishing.

-8-
Fishing charters, largely located in South County, are accessed by a large percentage of these visitors

- Specific estimates are difficult to determine since different methods yield significantly different results
- MFS calculated 47,365 fishing days by charter in RI

**FISHERMEN INTERCEPTS**

182,000 anglers

*9% used charters as mode of fishing*

16,380 visitors

**CHARTER BOAT SURVEY**

92 trips per year with 3 people per charter

*169 estimated charter boats (1)*

46,664 visitors

Note: not all charters are active so this number is likely overstated

(1) Based on weighted average of survey results

Recreational fishing is also a major contributor to the shoreline economy in South County

**DISCUSSION**

- Recreational saltwater fishing is a mainstay of outdoor activity along RI’s South Shore
- Based on intercept surveys NP estimates that at least ½ and possibly as much as 2/3 of fishing activity takes place along this shoreline
- DEM study of Bay fishing supports that the most actively fished sites are located in the southern portion of the state
- Top 3 cited towns representing 50% of cited locations were in the lower Bay
- Much as sailing contributes to the atmosphere in Newport, recreational angling provides the “atmosphere” for several south shore areas such as Snug Harbor, East Matunuck, Charlestown, and Block Island

**Estimated Percent of Shoreline Economic Activity Generated by Anglers**

- 44%
- 9%

Source: RI tax collections; NAICS and ES 202 data; Based on NP analysis of spending; fishermen surveys, and fishermen counts
Appendix

ANGLER SURVEY

Angler Survey Background

Intercept Locations
- RI Saltwater Fishing Show
- Charlestown Breachway
- Matunuck thru Green Hill
- Goddard Park / Greenwich Bay marinas
- Barrington / Warren Bridge
- Colt State Park
- Hansen’s Landing Public Access
- Second Beach / Ocean Drive

Demographic Profile
- 84% white
- 16% non-white
- 46% incomes less than $50K
- 54% incomes greater than $50K

Survey Topics
- Place of residence
- Number of fishing trips
- % of trips in RI
- Nature of trips
- Overnight stays
- Accommodations while staying overnight
- Fishing mode
- Fishing-related expenditures while in RI

Fifty-five percent of survey respondents were from out-of-state

Seventy-two percent of anglers take between 11 and 20 trips a year
More than $\frac{1}{2}$ of all fishing trips take place in RI

Fishing as a recreational amenity has an interesting dimension

*They don’t necessarily fish while on vacation*

*But will take a special trip to fish*

Note: Does not add to 100 due to no responses

Most anglers in RI fish by boat
Slightly more than $1/3$ stay overnight in Rhode Island when they fish here.

**Overnight Stays and Choice of Accommodations**

- Overnight: 38%
- Day Trip: 29%
- House: 47%
- RV: 24%
- Hotel: 29%

Overnight anglers participate in a series of other activities when staying in RI.

**Other Activities During Overnight Stays**

- Go to Bars/Pub: 52%
- Dine Out: 42%
- Golf: 48%
- Cultural Amenities: 3%
- Beach: 11%
- Other: 15%
Angler expenditures

Angler Annual Expenditures on Fishing Related Gear

Average Estimated Expenditures For Present Fishing Trip

Estimated Expenditures

Day Trip Average Expenditures by Mode

Overnight Stay Expenditures
Charter boat activities

- Based on a N=14 or approximately 8% of the registered charter boat industry
- Note: Some charts may not add to 100 due to rounding
- Charter boat expenditures were requested but there was a limited response

Charter Boats
Annual Fishing Trips

<table>
<thead>
<tr>
<th>Category</th>
<th>14%</th>
<th>29%</th>
<th>36%</th>
<th>21%</th>
<th>7%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 50</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50-75</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>75-100</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>100-150</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>150+</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Number of People per Charter

<table>
<thead>
<tr>
<th>Category</th>
<th>38%</th>
<th>43%</th>
<th>14%</th>
<th>6%</th>
<th>1%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1to2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2to4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4to6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6to10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10+</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Estimated % of Anglers by Place of Residence

<table>
<thead>
<tr>
<th>Place of Residence</th>
<th>36%</th>
<th>64%</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-state</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Out-of-state</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Charter Boat Gross Revenues

<table>
<thead>
<tr>
<th>Revenue Range</th>
<th>21%</th>
<th>57%</th>
<th>21%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $75K</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$75K-$100K</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$100K+</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Estimated Economic Impact Methodology

Estimating model used by Ninigret Partners

- Secondary data analysis
- Angler Interviews
- Interviews of retailers and distributors

Angler Expenditure Estimates

Percentage-based Allocation to Calculate Jobs & Wages

Allocation methodology calculation

\[
\% \text{ of Category Attributable to Anglers} = \frac{\text{Angler Expenditure Estimates}}{\text{Total Revenues By Category}} \times \% \text{ of Category Attributable to Anglers}
\]

Example of Estimation: Triangulation to test Bait and Tackle sales

It is highly likely that saltwater bait and tackle sales fall between $13 and $16 million

\[
\begin{align*}
\text{RI is 2\% of All Estimated Saltwater Fishing Trips} & \quad \times 407 \text{ M Saltwater Expenditures} = 8.14 \text{ M} \\
\text{RI Sporting Good Sales} & \quad \times 9\% \text{ of sales are fishing} = 7 \text{ M} \\
\text{59 RI Bait & Tackle Retailers} & \quad \times 450 \text{K per store average} = 15.9 \text{ M} \quad \text{(includes bait sales)}
\end{align*}
\]

Source: NSGA, MFRSS, NP interviews, Claritas sales data
For more information about this report contact
The Rhode Island Saltwater Anglers Association
6 Arnold Road
Coventry, RI 02816
401-826-2121