SOUTHWICK STUDY ROAD MAP
COMMONWEALTH OF MASSACHUSETTS

Introduction

The recreational saltwater fishery for wild, migratory striped bass along the coast of Massachusetts is worth $1.16 billion to the Commonwealth's economy, making it one of the most important sport fisheries on the eastern seaboard. In addition to the well publicized opportunities for resident and tourist anglers on Cape Cod and environs, fishing for striped bass is increasingly popular along the north and south shores of the state as well as in the waters surrounding the highly populated Boston area.

Few saltwater recreational species migrate as far north as Massachusetts, but stripers arrive in late April and often stay as late as early November, which makes them especially valuable to the approximately 549,000 anglers in the Commonwealth who make directed trips for striped bass each year. In Massachusetts, there is no replacement for stripers as a staple of the recreational fishing industry.

In 2004, Stripers Forever commissioned Southwick Associates, a prominent supplier of socio-economic data to government and industry, to do a major study comparing the economics of commercial and recreational fishing for striped bass in Massachusetts. Many of the findings in the study, which is entitled The Economics of Recreational and Commercial Striped Bass Fishing in Massachusetts, are based on data from the NOAA Marine Recreational Fishery Statistics and Survey conducted annually in Massachusetts. Financial support for the Southwick Study was gathered from a large number of individuals, companies, and organizations. They are listed inside the study's front cover.

The Southwick Study forecasts economic changes that would be brought about by ending commercial exploitation of striped bass and managing the species only for recreational/personal-use fishing, as was done for freshwater game fish and waterfowl earlier in the 20th century. Additionally, Southwick examined the economics of replacing the commercial harvest of wild fish with stripers raised through aquaculture, which already produces over 60 percent more pounds of striped bass for the marketplace than does the wild harvest.

To indicate just how important the recreational striped bass fishery is to the Commonwealth of Massachusetts, here are some statistics for 2003 from the Southwick Study:

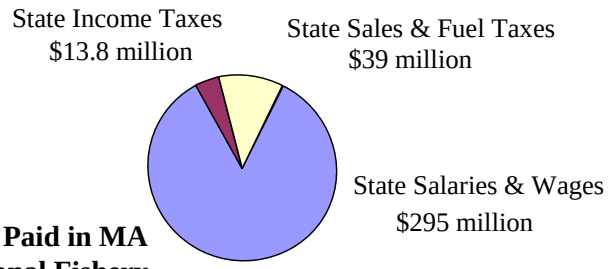
- 548,691 anglers made a total of 2,631,935 fishing trips targeting striped bass in Massachusetts waters. Put another way, 64.4 percent of all saltwater fishing trips taken in Massachusetts targeted stripers. (Appendix 1, page 36, and Table 1, page 5)

- Of the 2,631,935 fishing trips taken in Massachusetts, 1,013,660 were taken by shore-based anglers. That number is 62.90 percent of all shore-based fishing trips for all species, and includes anglers who cannot afford a boat to go fishing. (Table 1, page 5)

- In 2003, a total of 38,069 party and charter boat trips were made targeting striped bass in Massachusetts; that is 26.2 percent of all charter trips made for all species taken in the state. (Table 1, page 5)

- The recreational fishery for striped bass in 2003 produced direct retail sales of approximately $650 million dollars (versus $6.2 million for the commercial fishery) and provided 10,986 full-time equivalent jobs (versus only 524 such jobs produced by the commercial fishery). The clear heavyweight here is the recreational striped bass fishery, which produces 105 times more in retail sales and 21 times more jobs than does the commercial fishery during its very brief season. (Table 9, page 13)

- In all, recreational striped bass fishing generated $295 million in salaries and wages, yielding $13.8 million in state income taxes. Additionally, $39 million in state sales and fuel taxes were paid by the recreational fishery. (Table 6 page 10)



Wages and Taxes Paid in MA by the Recreational Fishery

- The social and economic benefits of recreational striped bass fishing are not simply realized by harvesting fish. Increases in the quality of fishing will bring about greater economic benefits even if the recreational community chooses to manage the resource by conserving some or all of the striped bass currently killed in the commercial fishery. This is an important consideration in managing a fishery with a cyclical history. The commercial fishery, by comparison, has no value at all without landings. (4.1 Approach #1, page 14)

An Overview by Stripers Forever of the Southwick Study

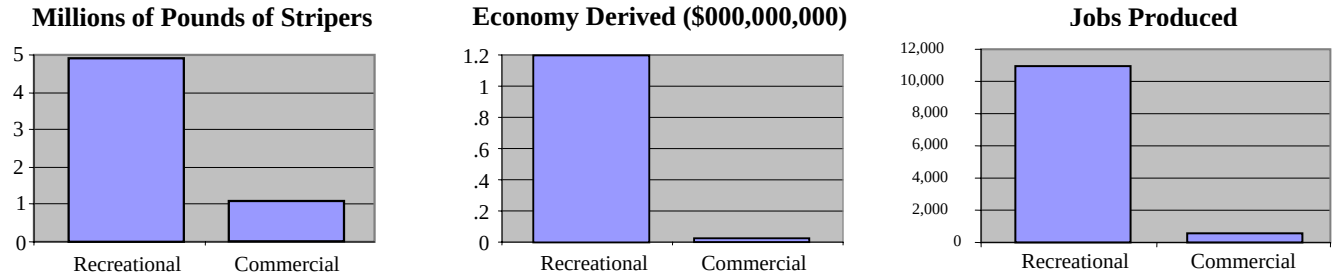
Economic studies are often dry and confusing, victims of the precise terminology that is necessary to make them accurate. In this brief overview, we have summarized the findings of the Southwick Study and pointed out the policy changes that would be of greatest benefit to the general public.

Impacts of Recreationally Harvested Striped Bass vs. Commercially Harvested Striped Bass

Recreational fishers in Massachusetts harvested 4.9 million pounds of stripers, or 4.6 times as many as the 1.1 million taken commercially.* The total new economic activity derived from these respective harvests -- calculated by multiplying the retail sales from each activity by a generally accepted number, or "multiplier," that reflects the influence one transaction has on the next in the economy -- is only $24.2 million for the commercial landings, but $1.2 billion, or 47.8 times greater for the recreational fishery. Jobs produced by the recreational fishery (10,986) dwarf those in the commercial sector (524) by a multiple of 21. (Table E-1, page iv)

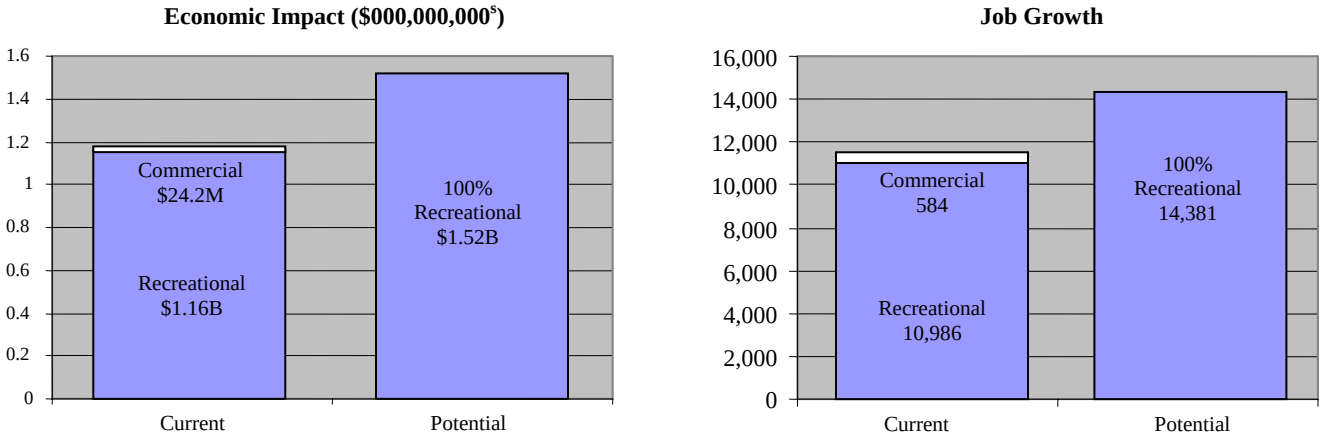
* The estimated recreational harvest of stripers in Massachusetts, which is based on catch-and-release mortality calculations assigned by the Atlantic States Marine Fisheries Commission, is considered by many to be highly inflated.

Wages and Taxes Paid in MA by the Recreational Fishery



The Effects Of Making Striped Bass A Saltwater Game Fish In Massachusetts: Actual and Hypothetical Economic Impacts

If the striper was made a game fish and 100 percent of the fishery was allocated to the recreational fishing public, total retail sales influenced by the accepted multipliers would rise from the current estimate of $1.16 billion for the recreational fishery and $24.2 million for the commercial – a total of $1.18 billion - to a new estimated total of $1.52 billion. ***That is an increase of nearly $334 million, or about 28.4 percent!*** Also, 2,871 new, full-time equivalent jobs would be created, increasing the number of total jobs from 11,510 to 14,381, a bump up of about 24.9 percent. (Table E-2, page iv)



Summary Point

A total of $334 million in new economic activity and 2,871 new jobs would be created by eliminating commercial fishing for striped bass in Massachusetts and reallocating the present commercial allotment to recreational fishing.

Aquaculture As a Substitute

In 2003, the last complete data year available, aquaculture produced 11.5 million pounds of striped bass (called "hybrids" in the industry), or 61.6 percent more than the 7.1 million pounds

taken in the wild commercial harvest. The price to the consumer was almost exactly the same on average at $2.78 a pound for wild fish vs. $2.75 for farm-raised product. As Southwick explains, the equal pricing means that the market does not value one fish product as superior to the other, a subjective argument often raised by some. Southwick also points out that in socio-economic terms, the relative economic impacts and jobs produced by aquaculture and commercial fishing for wild fish are approximately equal. (Table E-3, page vi)

The production of striped bass farms has increased 222 percent in the past 10 years, indicating that fish suppliers in Massachusetts will be able to meet any consumer demand for striped bass by providing fish produced through aquaculture. (Page vi)

Summary Point

Aquaculture stands ready to offer a comparably priced product to replace wild striped bass.

Stripers Forever On the Net Effect of Making Striped Bass a Game Fish, While Assuming Replacement of the Commercial Harvest With Fish Raised Through Aquaculture

While the Southwick Study is an economic analysis based on current realities, it should also be pointed out that wild striped bass are subject to great fluctuations in supply due to unpredictable population levels. Aquaculture is able to ensure that the public has a dependable supply of fresh fish available. Also, the supply of wild striped bass is very finite and harvests are already at all-time high levels. Maintaining the current level of wild harvest is highly unlikely. Since the striped bass crash of the 1970s, the commercial quotas have been expanded and now exceed pre-crash levels, while size and bag limits for personal-use anglers in Massachusetts have gone from a minimum size of 16 inches with no bag limit to a 28-inch minimum size and a two fish bag limit. This regulation has essentially destroyed the historic personal-use fishery for smaller striped bass in the Commonwealth, and has put unwarranted strain on the population of larger, breeding-age stripers.

A combination of recreational fishing, personal-use consumption of wild fish constrained at levels that will allow a high quality fishery, and an increase in product raised through aquaculture offers the greatest possible benefits to Massachusetts, both in economic terms, including full-time equivalent jobs, and with regard to providing food for the general public. The current commercial fishery for wild striped bass detracts from jobs and other economic activity in the Commonwealth. Further, the wide seasonal price fluctuations in the wild catch act as a disincentive to expanding the aquaculture industry.

The Solution

Stripers Forever supports legislation which would eliminate all commercial fishing for wild striped bass throughout their range. Stripers Forever is also in favor of using funds raised through the sale of a dedicated recreational striped bass stamp to buy out those licensed commercial harvesters who can document that a significant portion of their income is derived from historical landings of wild striped bass.

To find out more about Stripers Forever, including contact information, and to read the full Southwick Report, please see our website at http://www.stripersforever.org.