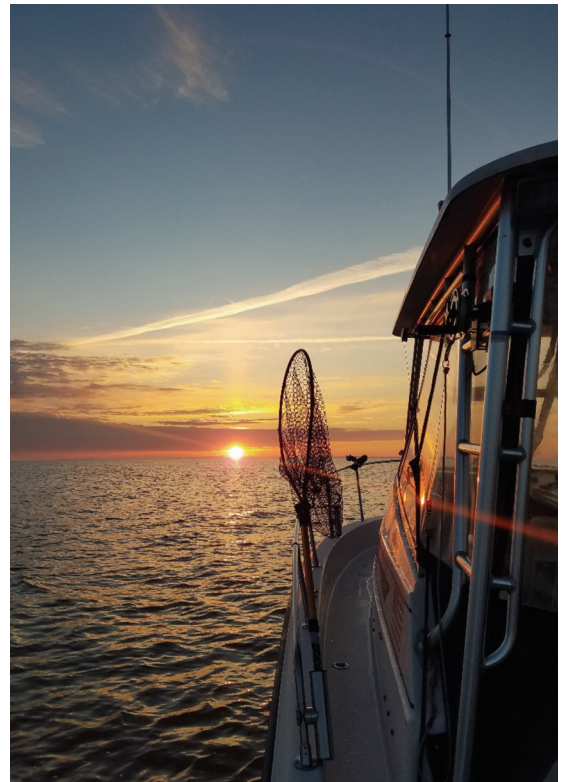


Ohio's Lake Erie Charter Fishing Industry in 2020



Lake Erie is the shallowest, southernmost and warmest of the Great Lakes. These characteristics combine to make it the most biologically productive, supporting abundant fish stocks including popular sport fish species such as Walleye and Yellow Perch. Ohio's Lake Erie coast offers great access for recreational anglers, including a robust and economically important charter fishing industry.

However, environmental conditions, economic climate and individual angler behaviors may all change over time. These changes could also impact the charter fishing industry. In early 2021, all captains who were licensed fishing guides during the 2020 season were invited to participate in an electronic survey. The first contact was by mail, followed by three reminder emails. The population of captains that received the survey was 787 and the response rate was 46%. This was the eighth survey of the Ohio Lake Erie charter fishing industry since 1985. The goal was to gauge the attitudes, characteristics and economic impacts of the industry for the 2020 season and document any changes from previous surveys. This information can be useful to captains, resource managers, local communities and decision makers assessing the health and needs of the industry.



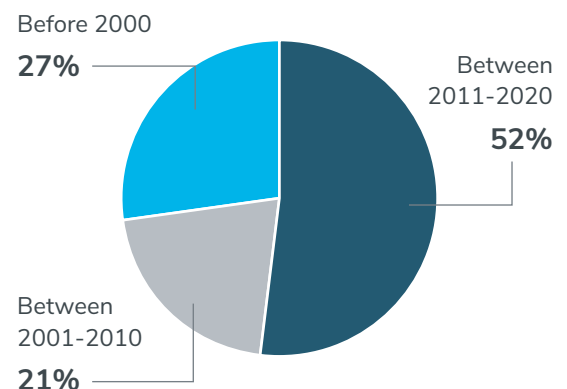
Snapshot of the Industry

There were 808 licensed fishing guides during the 2020 season and 707 active charter firms, including a wealth of experienced guides with nearly half (48%) having over 10 years of experience (Figure 1). Just over half (52%) obtained their fishing guide license since 2011, which may suggest a healthy, growing industry with a substantial number of new members.

The majority of fishing guides (72%) held a "six-pack" captain license, meaning the maximum number of passengers they can carry is six. Some run smaller boats and cater to one to three people but are still required to have the six-pack license. Fishing guides that carry more than six passengers are required to have an "inspected vessel" captain license.

Most charter captains operate as a small business, often in rural locations, and bring in customers that help support other local businesses such as restaurants and bait shops. Captains estimated that 60% of their clients came from more than 50 miles away.

Figure 1. When Did Guides Obtain Their License?



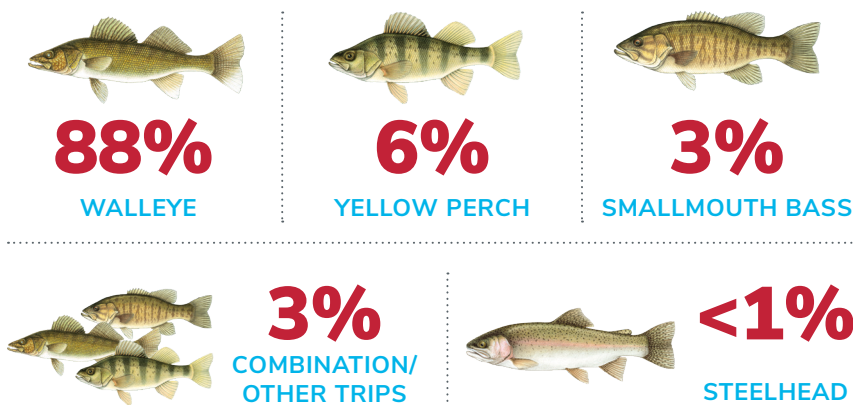
Charter Fishing Trip Characteristics

Data show that Ohio charter fishing captains ran an estimated 26,830 trips on Lake Erie in 2020, an average of 38 trips per business. The season spanned March through November, but June and July were the busiest months. Nearly half of captains (48%) reported running multiple trips in a single day.

Walleye were targeted far more than any other species, accounting for 88% of all trips in 2020. The next most popular was Yellow Perch (6%) followed by Smallmouth Bass (3%), combination/other trips (3%) and Steelhead (<1%). Combination trips most often targeted Walleye and Yellow Perch.

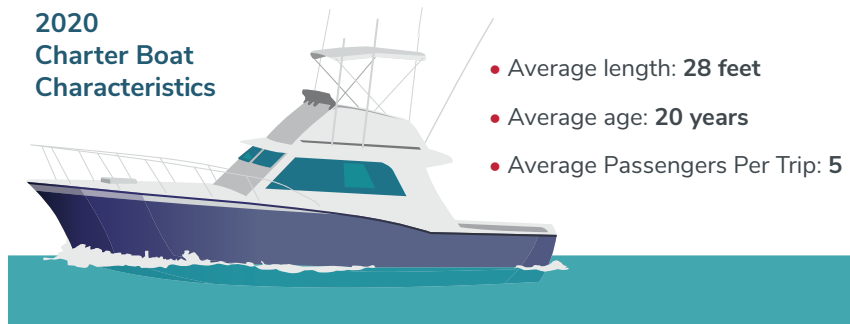
Daily limits are a tool often used by managers to sustain sport fish populations. Some anglers may judge the success of a trip based on reaching these limits, depending on the target species. Captains feel it is more important to market a 'limit catch' when fishing for Yellow Perch or Walleye than Smallmouth Bass or Steelhead.

Types of Fish Targeted in Charter Trips in 2020



Artwork by Tom Hanlon, courtesy the Ohio Division of Wildlife

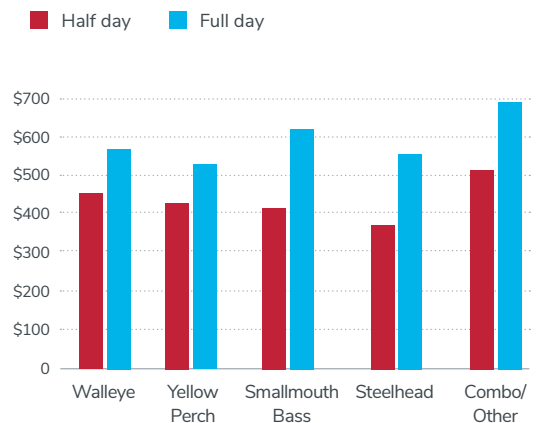
2020 Charter Boat Characteristics



How Much Does a Charter Trip Cost?

The average charter fishing trip from a six-pack captain was \$545 per group, but prices vary widely depending on time on the water, species targeted and services offered. Many captains offer both half- and full-day trips, with half-days costing less (Figure 2). Most trips target one species, but some captains offer combination trips or may switch to another species if a limit of the target species is reached. For an increased fee, some businesses offer trips with lunch, fish cleaning or other services.

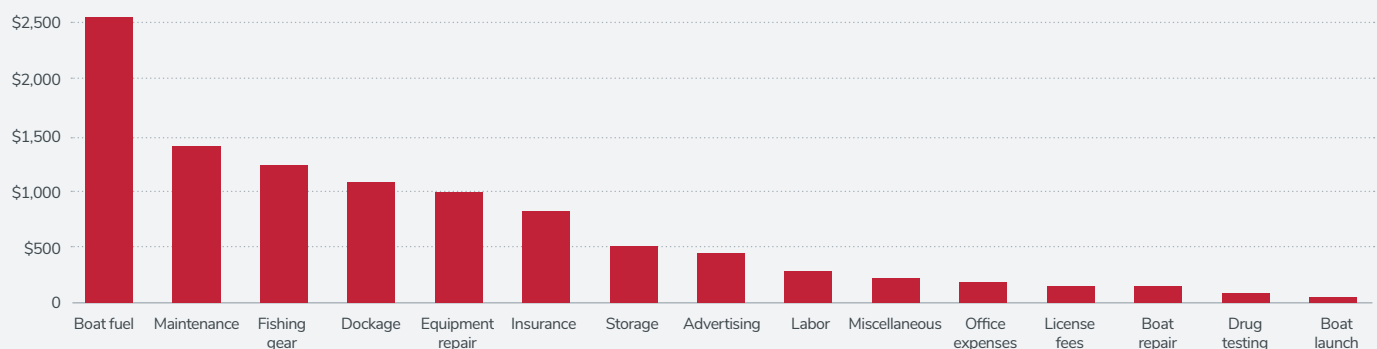
Figure 2. Average Cost per Trip Type in 2020



Revenue and Operating Costs

In total, Ohio Lake Erie charter fishing captains earned an estimated \$14.6 million in revenue in 2020. This is an average of \$20,664 per business. There are also considerable costs involved in running a charter business. In 2020 the top three were boat fuel, maintenance, and fishing gear (rods, reels, ice, bait and tackle). Overall operating costs per business averaged \$10,230 (Figure 3).

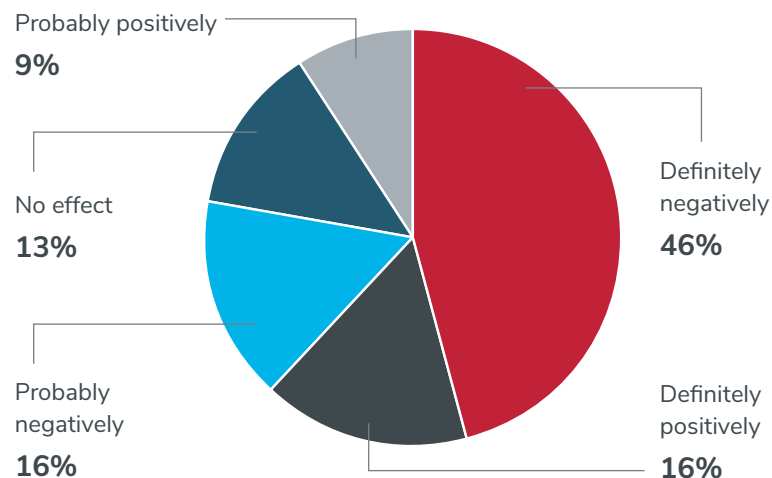
Figure 3. Average Operating Costs Per Business in 2020



COVID-19 Pandemic Impacts

In March 2020 Ohio declared a State of Emergency due to the emerging COVID-19 pandemic. With the charter fishing season typically starting in March, this declaration had potential to impact the industry. While the majority of responding captains reported negative effects of the pandemic, some reported no effect or even positive effects (Figure 4). Only 8% of captains reported applying for and receiving business-specific pandemic aid from the government. When asked about 2019, captains reported average gross sales of \$17,024, operating costs of \$13,194, and 41 trips per business. Despite COVID-19, on average charter businesses reported higher revenues and lower operating costs in 2020, though they did run fewer trips.

Figure 4. Pandemic Influence on Charter Businesses in 2020



Charter Captain Motivations

Not surprisingly, charter captains love to fish. When asked why they are a professional charter fishing captain the top reason reported was the opportunity to help people enjoy fishing (64%). Other major reasons are for a secondary source of income (58%) and simply liking the work (51%). Only 15% of Ohio captains use it as their primary source of income. Other reasons included:

"Family been in it for a long time, and I hope my kids will too"

"Helps get my mind off our political system."

"I love to teach people how to fish!"

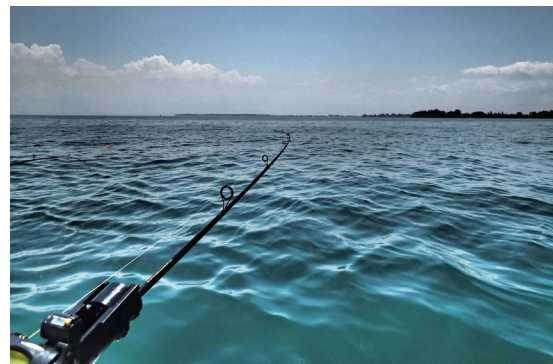
"Chartering pays for winters down south"

"Future retirement job"

"Disabled: just gets me on the water"

"Second career, retired firefighter and avid outdoorsman"

"All about getting kids off their devices and back into the outdoors"

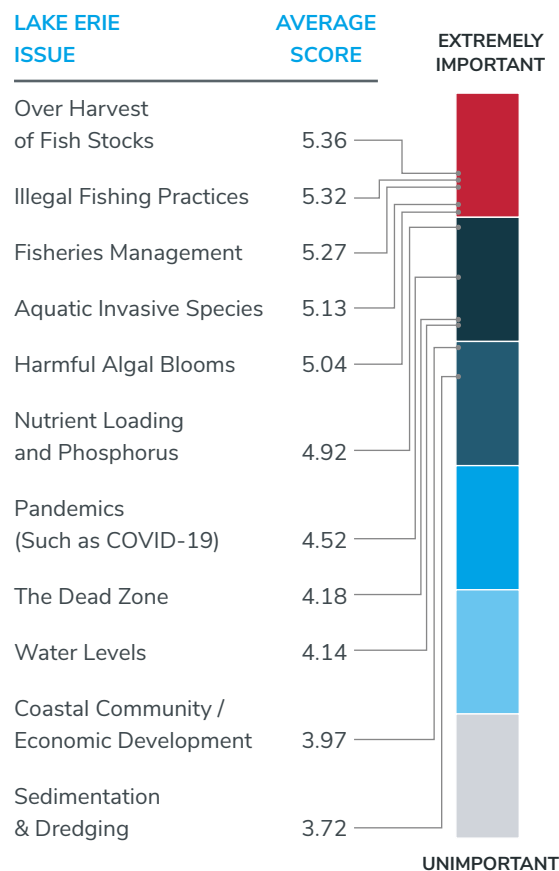


Charter Captain Perspectives

We asked captains to rate certain Lake Erie issues in terms of importance to their business. As businesses that depend on strong fish populations, it makes sense that issues directly pertaining to the health and viability (e.g., overharvest of fish stocks) of the fishery would rank highest (Figure 5). Interestingly, though more than one-half of captains felt the COVID pandemic negatively impacted their business, this issue was given a relatively low priority.

This list could be used by Lake Erie resource managers, researchers, and decision makers to identify topics and needs that could benefit the charter industry. Listening sessions or focus groups to gain feedback from the industry, and outreach and education about what is currently being done on these issues, may be useful strategies to address their concerns.

Figure 5: Importance of Lake Erie Issues According to Charter Captains



Recent Changes and Future Plans

When asked about changes they have made in the past five years, and plan to make in the next five years (Table 1), a couple of activities stand out above the rest. Increasing prices of charter services and increasing the number of charter trips per year are the top two items in both recent changes and future plans. Many captains also plan to buy a newer, bigger, or additional charter boat. While some are planning on quitting or decreasing the number of trips, the data suggest an overall upward trend in Ohio's charter industry.

Table 1: Recent Changes to Charter Activities and Future Plans

Description of Planned Changes	Major Changes Planned in Next Five Years	Major Changes Made in Past Five Years	Both
Increase prices of charter services	27%	28%	13%
Decrease prices of charter services	1%	3%	0%
Increase number of charter trips per year	39%	11%	10%
Decrease number of charter trips per year	10%	5%	3%
Buy own charter boat	6%	5%	1%
Buy a bigger charter boat	16%	5%	1%
Buy a newer charter boat	19%	5%	1%
Buy additional charter boat	13%	1%	1%
Start own charter business	1%	4%	0%
Expand into multi-activity and/or non-fishing charters	12%	1%	1%
Operate bigger charter boat	5%	0%	1%
Operate newer charter boat	10%	2%	0%
Operate additional charter boat	5%	1%	1%
Hire additional charter captain(s)	12%	2%	1%
Hire additional first mate(s)	12%	5%	1%
Branch out into other fishing related business	10%	2%	0%
Change fishing method of capture	5%	1%	1%
Quit the charter business	10%	0%	0%
No major changes	4%	4%	3%
Others	3%	1%	0%

How to Find a Charter Captain

If you'd like to book a charter trip, you need to know where to look. Most captains market through word of mouth or directly to customers (87%), but many increasingly take advantage of low-cost or free virtual tools such as websites, Facebook, or other social media (75%). Business cards are also still popular (70%) and handed out at trade shows or marinas. Few businesses currently rely on paid print (13%), paid digital (11%), radio (1%), or television (1%).

75%



OF CHARTER CAPTAINS USE
VIRTUAL TOOLS AND SOCIAL MEDIA

*Ohio boasts the largest
charter fishing fleet on the
Great Lakes with more than*



800
CAPTAINS

72%

HOLD A SIX-PACK
CAPTAIN LICENSE

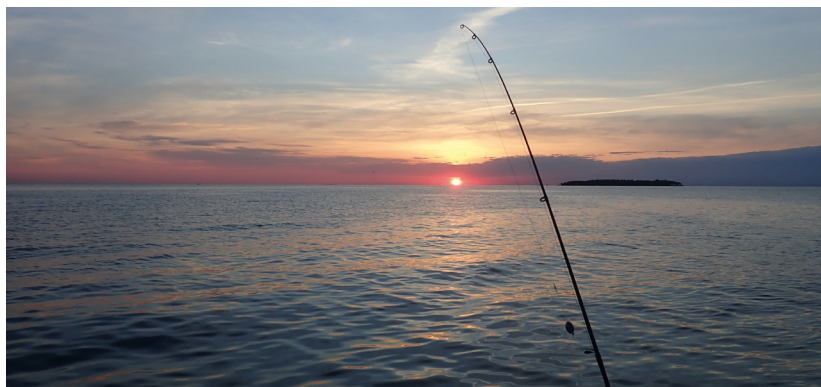
Table 2. Select Industry Comparisons Between 2010 and 2020

Item	2010	2020	Change
Licensed Fishing Guides	786	808	+22
Percent of Captains Operating Own Business	81%	88%	+7%
Average Boat Size	28 feet	28 feet	No Change
Average Trips Per Business	35	38	+3
Total Trips for All Businesses	21,082	26,830	+5,748
Average Charge Per Trip	\$459	\$545	+\$86
Average Total Operating Costs Per Business	\$12,405	\$10,230	-\$2,175

Conclusion

Ohio's Lake Erie charter industry appears to have had a successful 2020 season. The number of licensed fishing guides, trips, charge per trip, and revenues all increased compared to 2010 (Table 2). The number of businesses operating one boat declined, indicating an increase in multi-boat businesses. Operating costs also declined with major reductions in fuel, advertising, and office expenses offsetting increases in boat maintenance and equipment repair and replacement. Recent trends and future plans suggest continued growth of the industry (Table 1).

While the industry appears to be thriving, there may be opportunity for further growth with efforts from Ohio's resource managers and local communities to highlight and promote charter fishing. This could potentially increase coastal tourism, benefit other local businesses, and encourage more people to experience Lake Erie's remarkable fishery. Ultimately, such efforts could help foster a more informed and environmentally aware citizenry.



ACKNOWLEDGEMENTS

Captain Paul Pacholski and the late Captain Dave Spangler of the Lake Erie Charter Boat Association served as local knowledge partners on this project. Travis Hartman and Brian Schmidt of the Ohio Department of Natural Resources, Division of Wildlife provided a management perspective. Dr. Brent Sohngen of The Ohio State University lent his expertise in natural resource and environmental economics. All were instrumental in shaping the scope of this project, developing the survey instrument, and analyzing the results. Special thanks to all the charter captains who responded to the 2020 Ohio Lake Erie Charter Captains Survey for providing us valuable insight into their industry.

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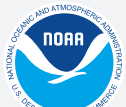
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