

# **A Survey of Oregon's Resident and Nonresident Sportsmen**

***For:***

**Oregon Department of Fish and Wildlife**

***By:***

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# A Survey of Oregon's Resident and Nonresident Sportsmen

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## Introduction

Southwick Associates conducted surveys on behalf of the Oregon Department of Fish and Wildlife in November and December of 2013. The surveys were aimed at resident and nonresident hunting and fishing license customers to estimate the potential effects of possible regulation and license changes.

## Survey Implementation and Response

The bulk of the survey was conducted online in December, 2013 through email invitations sent to ODFW license customers who purchased a license between 2008 and 2013. A smaller paper survey was also conducted to capture the responses of license customers for whom ODFW does not have an email address and to examine potential bias among ODFW customers with email addresses.

ODFW license records include email addresses for slightly more than five percent of all customers from 2008 through 2013. As a result, there was concern that those with email addresses may not adequately represent all ODFW customers. Prior to conducting the survey, the demographics of the two groups were compared to determine the need for stratifying the sample. The overall age distribution shows small differences without a clear pattern. Records of the youngest customers are slightly more likely to include an email address while records of the oldest customers are somewhat less likely to include an email address. Those with an email address are more likely to be male. It was determined that the differences did not warrant a pre-survey stratification of the sample. Following completion of the survey, proportional weights were calculated separately for residents and nonresidents on the basis of age, gender, type of sportsmen (angler, hunter or both) and year of last license purchase to reflect the composition of ODFW's total resident and nonresident customers.

**Table 1. Demographic comparison of all ODFW customers with and without available email addresses**

	No email address	With email address
<b>Age</b>		
Under age 24	14.4%	12.7%
25 to 44	36.0%	36.4%
45 to 64	35.6%	40.1%
65 and over	13.9%	10.8%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>
<b>Gender</b>		
Male	72.6%	83.4%
Female	27.4%	16.6%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>

Due to the increased time required to administer a paper survey, this portion of the survey was conducted a month earlier, in November 2013. Copies of the survey instruments are provided in an appendix.

Paper Survey Timeline:

1. First postcard: 10/25/2013
2. First survey packet: 11/1/2013
3. Reminder postcard: 11/8/2013
4. Second survey packet: 11/18/2013

Online Survey Timeline:

1. Initial email invitation: 12/3/2013
2. Reminder email: 12/9/2013

The response to the email survey was 30.4% for the resident survey and 27% for the nonresident survey. This was slightly lower than the response to the direct mail paper survey.

**Table 2: Survey Mail-out and Response.**

	ONLINE SURVEY		MAIL SURVEY		TOTAL SURVEY	
	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident
Original List	40,181	24,188	600	600	40,781	24,788
Undeliverable	3,799	2,432	31	22	3,830	2,454
Net Mail-out	36,382	21,756	569	578	36,951	22,334
Responses	<b>11,050</b>	<b>5,880</b>	<b>190</b>	<b>178</b>	<b>11,240</b>	<b>6,058</b>
Response Rate	30.4%	27.0%	33.4%	30.8%	30.4%	27.1%

## Resident Survey Results

### Recent and Planned Activity

- Just under two-thirds (63%) of resident respondents reported fishing in the past 12 months.
- Over one-third (38%) reported hunting in the past 12 months.
- 27% of resident respondents reported both fishing and hunting and 36% only fished.
- 26% of respondents said they neither fished nor hunted in Oregon in the past 12 months.
- 43% said they planned to both fish and hunt in Oregon in the next 12 months and another 41% said they planned to fish only.
- Only 8% of resident respondents did not plan to fish or hunt in the next 12 months.

**Table 3: Fished in Oregon in the past 12 months (Q1a).**

<b>Fished</b>	<b>%</b>
Yes	62.8%
No	37.2%
<b>N= 11,138</b>	

**Table 4: Hunted in Oregon in the past 12 months (Q3a).**

<b>Hunted</b>	<b>%</b>
Yes	37.7%
No	62.3%
<b>N= 11,068</b>	

**Table 5: Hunted and/or Fished in Oregon the past 12 months (Q1a and Q3a).**

<b>Hunted and/or Fished</b>	<b>%</b>
Both Hunted and Fished	26.8%
Fished Only	36.1%
Hunted Only	11.0%
Neither	26.1%
<b>N= 11,067</b>	

**Table 6: Plan to fish and/or hunt in Oregon in 2014 (Q15).**

<b>Hunt or Fish</b>	<b>%</b>
Both Hunt and Fish	43.4%
Fish Only	41.3%
Hunt Only	7.3%
Hunt or Fish	92.1%
<b>N= 11,240</b>	

- Respondents who indicated they fished in past 12 months reported fishing an average of 16.5 days during that time. However, half reported fishing nine days or less.
- Respondents who indicated they hunted during the past 12 months reported hunting an average of 14.8 days. Half of these hunted 10 days or less.

**Table 7: Days fished in Oregon in past 12 months (Q1b).**

<b>Days Fished</b>	<b>#</b>
Mean	16.5
Median	9.0
<b>N= 7,762</b>	

**Table 8: Days hunted in Oregon in past 12 months (Q3b).**

<b>Days Hunted</b>	<b>#</b>
Mean	14.8
Median	10.0
<b>N= 6,880</b>	

- Trout was targeted by 74% of respondents who reported fishing, by far the most targeted species.
- Salmon was the second most targeted at 44% followed by steelhead at 34%.

**Table 9: Fish species targeted in Oregon by anglers during past 12 months (Q2).**

Targeted Fish Species	%
Trout (other than steelhead)	74.2%
Salmon	43.9%
Steelhead	34.2%
Bass	21.2%
Ocean Bottomfish	12.7%
Pan Fish	11.0%
Other	9.6%
Sturgeon	8.8%
Tuna	5.0%
Surfperch	4.9%
Halibut	4.7%
Walleye	2.8%
<b>N= 7,756</b>	

- Three-quarters (76%) of respondents who hunted reported hunting deer.
- Elk was also targeted by a majority of hunters (62%).
- Just over one-quarter of respondents who hunted (27.5%) targeted upland game birds and one out of five reported hunting waterfowl.

**Table 10: Game species targeted in Oregon by hunters during past 12 months (Q4).**

Targeted Game Species	%
Deer	75.6%
Elk	61.9%
Upland Game Birds	27.5%
Waterfowl	20.6%
Bear	18.1%
Cougar	14.3%
Small Game	13.1%
Turkey	13.1%
Other	7.5%
<b>N= 6,888</b>	

## Multi-Year Licenses

The survey included three questions (Q7abc) where respondents were asked separately for angling, hunting, and combination licenses if they would purchase an annual, three-year, or five-year version of these. Each respondent was asked only to evaluate one version of these questions. However there were nine versions in total distributed randomly across the entire sample, each with a different combination of prices for the three and five-year licenses. The annual licenses were always shown at their current price.

The response to these questions was analyzed using a discrete choice model to estimate relative probabilities that a sportsman would choose one of these licenses based on duration of license and price. This allows the share of preference for any of the possible options (annual, three-year, or five-year) to be calculated at any price. However, ODFW will not likely offer both a three-year and a five-year license, therefore the analysis was conducted separately for each of these to estimate preference between the multi-year license and the annual license at the three price levels that were used in the survey questionnaire.

**Note:** *The percent of respondents saying they would purchase a multi-year license is much larger than the proportion of sportsmen who purchase a license every year over a three or five year period. Unfortunately, there was no way to account for this in the analysis since ODFW does not currently sell a multi-year version of any of the licenses tested in the survey. As a result, the estimates of sales and revenue may be exaggerated.*

### Multi-Year Angling

The basis for the multi-year angling license analysis is the number of resident annual angler licenses sold in 2013 (260,291) applied to the estimated number of licenses purchased over a three or five year period<sup>1</sup> based on sales records provided by ODFW. The percent of annual anglers who would switch to the multi-year license is based on the discrete choice analysis of the response to Question 7a in the questionnaire.

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<sup>1</sup> For the three-year license 2010-2012 was used and 2008-2012 was used for the five-year analysis. We did not have complete records for 2013.

### Three-year fishing license

- Based on the discrete choice analysis, 39% of annual anglers would switch to a three-year angling license at the full price of \$95; 43.7% would do so if the price were discounted to \$84.25.
- Angling license revenue would be increased by 30.4% by adding the three-year license at no discount (\$95) and by 25% if it were offered at \$84.25.
- Note that currently only an estimated 19.8% of annual angling license customers purchase a license in three out of three years. This shows the potential for capturing more revenue with a three-year license, but also indicates that respondent may be exaggerating their willingness to purchase a three-year license.

**Table 11: Projected Sales of 3-Year Angling License (Q7a).**

Price Of 3-Year Angling License	\$84.25	\$89.00	\$95.00
Share of Preference: 3-Year License*	43.7%	41.6%	39.0%
# Purchasing Annually over 3 Years**	260,471	270,221	282,333
# Purchasing 3-Year License	202,409	192,659	180,546
Annual License Revenue over 3 Years**	\$13,621,763	\$14,131,657	\$14,765,086
3-Year License Revenue	\$16,648,116	\$16,761,306	\$16,790,820
<b>Total Projected Revenue over 3 years</b>	<b>\$30,269,880</b>	<b>\$30,892,963</b>	<b>\$31,555,906</b>
<b>Annualized Projected License Revenue</b>	<b>\$10,089,959.85</b>	<b>\$10,297,654</b>	<b>\$10,518,635</b>
<b>Current Annual License Revenue</b>	<b>\$8,069,021</b>	<b>\$8,069,021</b>	<b>\$8,069,021</b>
<b>% Change in Annual License Revenue</b>	<b>25.0%</b>	<b>27.6%</b>	<b>30.4%</b>
<b>Annualized Total Projected Revenue w/SFR \$</b>	<b>\$12,465,828</b>	<b>\$12,644,462</b>	<b>\$12,829,342</b>
<b>Current Annual Revenue w/SFR \$</b>	<b>\$9,841,603</b>	<b>\$9,841,603</b>	<b>\$9,841,603</b>
<b>% Change in Total Annual Revenue</b>	<b>26.7%</b>	<b>28.5%</b>	<b>30.4%</b>

\* Actual % purchasing 3/3 years was 19.8%

\*\* Assuming anglers purchasing annual licenses purchase an average of 1.69 licenses over 3 year period

### Five-year fishing license

- Given the choice between a five-year and an annual license, 22.6% of annual anglers would switch to the five-year license at the full price of \$157. This would increase to 28.3% if the price were discounted to \$140.25.
- Annual angling license revenue would increase by 33.8% if the five-year license were offered at a price of \$140.25.
- Only an estimated 7.9% of annual anglers purchase a license in five out of five years indicating that respondents may be exaggerating their willingness to purchase a five-year license.

**Table 12: Projected Sales of 5-Year Angling License (Q7a).**

<b>Price Of 5-Year Angling License</b>	<b>\$140.25</b>	<b>\$148.50</b>	<b>\$157.00</b>
<b>Share of Preference: 5-Year License*</b>	<b>28.3%</b>	<b>25.4%</b>	<b>22.6%</b>
# Purchasing Annually over 3 Years	418,452	435,603	452,004
# Purchasing 5-Year License	165,511	148,359	131,959
Annual License Revenue over 5 Years**	\$30,775,362	\$32,036,807	\$33,242,989
3-Year License Revenue	\$23,212,938	\$22,031,357	\$20,717,547
<b>Total Projected Revenue over 5 years</b>	<b>\$53,988,299</b>	<b>\$54,068,164</b>	<b>\$53,960,536</b>
<b>Annualized Projected License Revenue</b>	<b>\$10,797,659.86</b>	<b>\$10,813,633</b>	<b>\$10,792,107</b>
<b>Current Annual License Revenue</b>	<b>\$8,069,021</b>	<b>\$8,069,021</b>	<b>\$8,069,021</b>
<b>% Change in Annual License Revenue</b>	<b>33.8%</b>	<b>34.0%</b>	<b>33.7%</b>
<b>Annualized Total Projected Revenue w/SFR \$</b>	<b>\$13,194,974</b>	<b>\$13,146,206</b>	<b>\$13,062,776</b>
<b>Current Annual Revenue w/SFR \$</b>	<b>\$9,841,603</b>	<b>\$9,841,603</b>	<b>\$9,841,603</b>
<b>% Change in Total Annual Revenue</b>	<b>34.1%</b>	<b>33.6%</b>	<b>32.7%</b>

\* Actual % purchasing 5/5 years was 7.9%

\*\* Assuming anglers purchasing annual licenses purchase an average of 2.23 licenses over 5 year period

### Multi-Year Hunting

The base of comparison used for the multi-year hunting license analysis is the number of resident annual hunter licenses sold in 2013 (87,104) applied to the estimated number of licenses purchased over a three or five year period based on sales records provided by ODFW. The percent of annual hunters who would switch to the multi-year license is based on the discrete choice analysis of the response to Question 7b in the questionnaire.

#### Three-year hunting license

- Based on the discrete choice model, 48.7% of annual hunters would switch to a three-year license at the full value price of \$84.50. This would increase to 52.9% if the price were discounted to \$75.25.
- Annual hunting license revenue would increase 29.1% if the three-year hunting license were offered at \$84.50.
- Only 28.2% of annual hunters currently purchase three out of three years, indicating that respondents may be overestimating their willingness to purchase a three-year license.

**Table 13: Projected Sales of 3-Year Hunting License (Q7b).**

Price Of 3-Year Hunting License	\$75.25	\$79.75	\$84.50
Share of Preference: 3-Year License*	52.9%	50.9%	48.7%
# Purchasing Annually over 3 Years	65,581	68,359	71,296
# Purchasing 3-Year License	73,521	70,743	67,806
Annual License Revenue over 3 Years**	\$3,387,948	\$3,531,470	\$3,683,170
3-Year License Revenue	\$5,385,422	\$5,500,263	\$5,594,031
<b>Total Projected Revenue over 3 years</b>	<b>\$8,773,370</b>	<b>\$9,031,733</b>	<b>\$9,277,202</b>
<b>Annualized Projected License Revenue</b>	<b>\$2,924,457</b>	<b>\$3,010,578</b>	<b>\$3,092,401</b>
<b>Current Annual License Revenue</b>	<b>\$2,395,360</b>	<b>\$2,395,360</b>	<b>\$2,395,360</b>
<b>% Change in Annual License Revenue</b>	<b>22.1%</b>	<b>25.7%</b>	<b>29.1%</b>
<b>Annualized Total Projected Revenue w/SFR \$</b>	<b>\$3,707,087</b>	<b>\$3,786,115</b>	<b>\$3,860,440</b>
<b>Current Annual Revenue w/SFR \$</b>	<b>\$2,990,280</b>	<b>\$2,990,280</b>	<b>\$2,990,280</b>
<b>% Change in Total Annual Revenue</b>	<b>24.0%</b>	<b>26.6%</b>	<b>29.1%</b>

\* Actual % purchasing 3/3 years was 28.2%

\*\* Assuming anglers purchasing annual licenses purchase an average of 1.88 licenses over 3 year period

### Five-year hunting license

- 49.8% of annual hunters would switch to a five-year license if it were offered at the full value price of \$139.50. 56% would do so if were discounted to \$125.50.
- Annual hunting license revenue would be increased by 50.5% by offering a five-year hunting license at a price of \$139.50.
- Only 12.9% of annual hunters actually purchase a license in five out of five years, indicating that respondents may be overestimating their willingness to purchase a five-year license.

**Table 14: Projected Sales of 5-Year Hunting License (Q7b).**

Price Of 5-Year Hunting License	\$125.50	\$132.75	\$139.50
<b>Share of Preference: 5-Year License*</b>	<b>56.0%</b>	<b>52.8%</b>	<b>49.8%</b>
# Purchasing Annually over 3 Years	73,325	78,653	83,648
# Purchasing 5-Year License	93,333	88,006	83,011
Annual License Revenue over 5 Years**	\$5,652,708	\$6,063,387	\$6,448,491
3-Year License Revenue	\$11,713,334	\$11,682,812	\$11,579,985
<b>Total Projected Revenue over 5 years</b>	<b>\$17,366,042</b>	<b>\$17,746,199</b>	<b>\$18,028,477</b>
<b>Annualized Projected License Revenue</b>	<b>\$3,473,208</b>	<b>\$3,549,240</b>	<b>\$3,605,695</b>
<b>Current Annual License Revenue</b>	<b>\$2,395,360</b>	<b>\$2,395,360</b>	<b>\$2,395,360</b>
<b>% Change in Annual License Revenue</b>	<b>45.0%</b>	<b>48.2%</b>	<b>50.5%</b>
<b>Annualized Total Projected Revenue w/SFR \$</b>	<b>\$4,372,424</b>	<b>\$4,431,087</b>	<b>\$4,471,256</b>
<b>Current Annual Revenue w/SFR \$</b>	<b>\$2,990,280</b>	<b>\$2,990,280</b>	<b>\$2,990,280</b>
<b>% Change in Total Annual Revenue</b>	<b>46.2%</b>	<b>48.2%</b>	<b>49.5%</b>

\* Actual % purchasing 3/3 years was 12.9%

\*\* Assuming anglers purchasing annual licenses purchase an average of 2.61 licenses over 5 year period

### Multi-Year Combination

The base of comparison used for the multi-year combination license analysis is the number of resident annual combination licenses sold in 2013 (79,235) applied to the estimated number of licenses purchased over a three or five year period based on sales records provided by ODFW. The percent of annual hunters who would switch to the multi-year license is based on the discrete choice analysis of the response to Question 7c in the questionnaire.

#### Three-year combination license

- Based on the discrete choice model, 45.1% of annual combination licenses buyers would purchase a three-year instead of an annual combination license at the full value price of \$170. 50.3% would do so if the price was discounted to \$148.
- Combination license revenue would increase by 31.8% if a three-year combination license were introduced at a price of \$70. It would be increased by 24.3% at a price of \$148.
- Only 22.9% of sportsmen who both hunt and fish purchase a license in three out of three years, indicating that respondents may be exaggerating their willingness to purchase multi-year licenses.

**Table 15: Projected Sales of 3-Year Combination License (Q7c).**

Price Of 3-Year Combination License	\$148.00	\$156.50	\$170.00
<b>Share of Preference: 3-Year License*</b>	<b>50.3%</b>	<b>48.3%</b>	<b>45.1%</b>
# Purchasing Annually over 3 Years	67,146	69,853	74,134
# Purchasing 3-Year License	67,987	65,280	60,999
Annual License Revenue over 3 Years**	\$6,614,342	\$6,881,001	\$7,302,692
3-Year License Revenue	\$9,926,050	\$10,085,703	\$10,247,796
<b>Total Projected Revenue over 3 years</b>	<b>\$16,540,391</b>	<b>\$16,966,703</b>	<b>\$17,550,488</b>
<b>Annualized Projected License Revenue</b>	<b>\$5,513,464</b>	<b>\$5,655,568</b>	<b>\$5,850,163</b>
<b>Current Annual License Revenue</b>	<b>\$4,437,160</b>	<b>\$4,437,160</b>	<b>\$4,437,160</b>
<b>% Change in Annual License Revenue</b>	<b>24.3%</b>	<b>27.5%</b>	<b>31.8%</b>
<b>Annualized Total Projected Revenue w/SFR \$</b>	<b>\$6,977,823</b>	<b>\$7,104,654</b>	<b>\$7,275,095</b>
<b>Current Annual Revenue w/SFR \$</b>	<b>\$5,517,925</b>	<b>\$5,517,925</b>	<b>\$5,517,925</b>
<b>% Change in Total Annual Revenue</b>	<b>26.5%</b>	<b>28.8%</b>	<b>31.8%</b>

\* Actual % purchasing 3/3 years was 22.9%

\*\* Assuming anglers purchasing annual licenses purchase an average of 1.76 licenses over 3 year period

### Five-year combination license

- Based on the discrete chose model of the combination license, 42.4% of annual combination buyers would switch to a five-year license if it were offered at the full value price of \$282. This would increase to 50.7% if the five-year license were discounted to \$246.50.
- Combination license revenue would be increased by 49.5%, according to the model, if the five-year license were offered at a price of \$282 or by 45% if it were offered at \$246.50.
- Only 9.4% of sportsmen who both hunt and fish currently purchase in five of five years, indicating that respondents may be exaggerating their willingness to purchase a five-year license.

**Table 16: Projected Sales of 5-Year Combination License (Q7c).**

Price Of 5-Year Combination License	\$246.50	\$261.00	\$282.00
<b>Share of Preference: 5-Year License*</b>	<b>50.7%</b>	<b>47.3%</b>	<b>42.4%</b>
# Purchasing Annually over 5 Years	82,133	87,827	95,985
# Purchasing 5-Year License	84,558	78,864	70,706
Annual License Revenue over 5 Years**	\$11,321,949	\$12,106,821	\$13,231,462
3-Year License Revenue	\$20,843,499	\$20,583,530	\$19,938,976
<b>Total Projected Revenue over 5 years</b>	<b>\$32,165,448</b>	<b>\$32,690,350</b>	<b>\$33,170,438</b>
<b>Annualized Projected License Revenue</b>	<b>\$6,433,090</b>	<b>\$6,538,070</b>	<b>\$6,634,088</b>
<b>Current Annual License Revenue</b>	<b>\$4,437,160</b>	<b>\$4,437,160</b>	<b>\$4,437,160</b>
<b>% Change in Annual License Revenue</b>	<b>45.0%</b>	<b>47.3%</b>	<b>49.5%</b>
<b>Annualized Total Projected Revenue w/SFR \$</b>	<b>\$8,118,980</b>	<b>\$8,183,214</b>	<b>\$8,220,847</b>
<b>Current Annual Revenue w/SFR \$</b>	<b>\$5,517,925</b>	<b>\$5,517,925</b>	<b>\$5,517,925</b>
<b>% Change in Total Annual Revenue</b>	<b>47.1%</b>	<b>48.3%</b>	<b>49.0%</b>

\* Actual % purchasing 3/3 years was 9.4%

\*\* Assuming anglers purchasing annual licenses purchase an average of 2.38 licenses over 5 year period

## One-Day Combination License

Question 8 was a two part question that first asked respondents whether they would purchase a Daily Combination license at a price of \$10, \$15, or \$20 depending on version of the questionnaire they received. This license would be a replacement for all current short term licenses currently sold by ODFW. If a respondent answered “yes” then they were asked if they would also add any of the following daily privileges to accompany it: Combined Angling Tag, Waterfowl Validation, and Upland Game Bird Validation.

- One-third of respondents said they would purchase a daily combination license if it were priced at \$10.
- When the price was doubled to \$20, half as many (16.8%) respondents said they would purchase it.

**Table 17: Would you purchase a daily combination license (Q8a)?**

Price Daily Combination	\$10	\$15	\$20
Yes, I would purchase	33.6%	24.3%	16.8%
No, I would not purchase	46.1%	54.3%	59.4%
Not sure/Do not know	20.3%	21.4%	23.8%
<b>N=</b>	<b>3,677</b>	<b>3,696</b>	<b>3,538</b>

- Respondents who said they would purchase the daily license at a higher price also said they were more likely to add an additional tag or validation. We would expect this since those willing to pay a higher price for the daily license are probably more avid sportsmen. However, the difference was not statistically significant.
- Two out of five respondents who said they would purchase the one-day combo license said they would be ‘very likely’ to also add a combined angling tag.
- Just under one in five said they would be ‘very likely’ to add a waterfowl or upland game bird validation (17.5% and 19.5% respectively).

**Table 18: Likelihood of purchasing an additional one-day privilege to accompany the one-day license (Q8b).**

Likelihood of adding one day tag/validation	Combined Angling Tag \$7	Waterfowl Validation \$4	Upland Game Bird Validation \$4
Very unlikely	12.7%	33.1%	31.5%
Somewhat unlikely	5.2%	14.1%	12.0%
Not sure/ Don't know	10.9%	18.9%	18.6%
Somewhat likely	31.6%	16.3%	18.5%
Very likely	39.7%	17.5%	19.5%
<b>N=</b>	<b>2,151</b>	<b>2,145</b>	<b>2,147</b>

*Only asked if answered 'yes, I would purchase' daily combination license.*

## Sales and Revenue Projections

Table 19 Table 20 show projected sales and revenue of daily combination licenses and privileges based on the response benchmarked to the current number of daily license sales. However, since ODFW does not currently sell a daily resident hunting license there is no way to benchmark the response by hunters to produce a realistic estimate of how many hunters would switch from an annual to a daily license. The current price of a single daily license is just above the middle price of \$15 used in this survey so this price point is used as the benchmark of current sales.

**Table 19: Projected daily combination license and tag sales.**

	<b>\$10.00</b>	<b>\$15.00</b>	<b>\$20.00</b>
Daily Combination License *	64,407	58,910	54,502
Daily privileges**			
Combined angling tag	24,651	23,182	23,490
Waterfowl validation	10,478	11,044	10,010
Upland game validation	11,744	10,966	12,705

\* Based on 58,910 days of resident daily licenses in 2013.

\*\* Based on respondents who would "Very likely" purchase a daily privilege

**Table 20: Projected revenue from daily combination license and tag sales.**

	<b>\$10.00</b>	<b>\$15.00</b>	<b>\$20.00</b>
Daily Combination License	\$644,071	\$883,656	\$1,090,032
Daily privileges*			
Combined angling tag	\$172,558	\$162,273	\$164,431
Waterfowl validation	\$41,914	\$44,175	\$40,040
Upland game validation	\$46,976	\$43,862	\$50,822

\*Based on respondents who would purchase a daily license would be "Very likely" daily privilege

## License/Tag Packages

Question 9 of the resident survey asked respondents whether they would purchase any of three possible license, tag, and validation packages at a discounted price from the full value of the individual privileges. There were three versions of this question with different discounted prices that were randomly assigned to each respondent in order to estimate a demand curve for the proposed packages. The three proposed packages are:

1. Spring or fall black bear and cougar tags only (would require separate purchase of a hunting license).
2. Annual hunting license with spring turkey tag, waterfowl validation, and upland game bird validation.
3. Annual angling license with shellfish license and combined angling tag.

Responses to this question were analyzed by the recent purchase history of respondents in order to account for sportsmen who are already purchasing these privileges at their full price.

### Black Bear and Cougar Tag Package

- 27.1% of respondents said they would purchase the black bear and cougar package at a price of \$24.75.
- Although fewer (25%) said they would purchase at the low price of \$19.75, this is not statistically different from the percent saying they would purchase at a higher price.

**Table 21: Spring or fall Black Bear and Cougar Tag Package (Q9).**

Would you purchase...?	\$26.00	\$24.75	\$19.75
Yes, would purchase	24.1%	27.1%	25.0%
No, would not purchase	56.8%	56.1%	57.7%
Not Sure/Don't know	19.0%	16.8%	17.3%
<b>N=</b>	<b>3,662</b>	<b>3,678</b>	<b>3,512</b>

Based on the previous privilege purchases of annual hunters saying they would purchase the black bear and cougar tag package, sales and revenue would be greatest at a price of \$24.75 (Table 22 and Table 23).

**Table 22: Projected sales of Black Bear & Cougar Tag Packages by previous license and privilege purchase.**

Current Hunters	Current Annual Hunters	Black Bear & Cougar Tag Package Buyers		
		\$26.00	\$24.75	\$19.75
Annual Hunting Only	67,096	14,002	16,565	15,674
Bear only	3,992	2,736	2,642	3,037
Cougar only	1,491	991	1,008	1,089
Bear and Cougar	1,661	1,347	1,430	1,408
<b>Tag Buyer Total</b>	<b>74,240</b>	<b>19,077</b>	<b>21,645</b>	<b>21,208</b>
Would Not Purchase*		55,163	52,595	53,032

\*Assumes they would purchase Annual Hunting license.

**Table 23: Projected revenue from sales of Black Bear and Cougar Tag Packages by previous privilege purchase.**

Current Hunters	Current Annual Hunters	Black Bear & Cougar Tag Package Buyers		
		\$26.00	\$24.75	\$19.75
Annual Hunting Only	\$1,979,332	\$777,113	\$898,638	\$771,935
Bear only	\$175,648	\$151,865	\$143,334	\$149,579
Cougar only	\$65,604	\$55,027	\$54,684	\$53,645
Bear and Cougar	\$97,169	\$74,751	\$77,594	\$69,354
<b>Tag Buyer Total</b>	<b>\$2,317,753</b>	<b>\$1,058,756</b>	<b>\$1,174,249</b>	<b>\$1,044,513</b>
Would Not Purchase*		\$1,627,318	\$1,551,549	\$1,564,433
<b>Total Revenue</b>	<b>\$2,317,753</b>	<b>\$2,686,074</b>	<b>\$2,725,797</b>	<b>\$2,608,945</b>

\*Assumes they would purchase Annual hunting license

#### Hunting, Turkey, Waterfowl, and Upland Bird Package

- The percent that would purchase the annual hunting license with turkey, waterfowl, and upland game bird validations was highest at a price of \$64.75. However, the differences were not statistically significant across the prices used in the survey.

**Table 24: Annual Hunting License, Spring Turkey Tag, Waterfowl Validation, and Upland Bird Validation (Q9).**

Would you purchase...?	\$68.50	\$64.75	\$61.25
Yes, would purchase	24.7%	32.6%	29.1%
No, would not purchase	53.0%	47.7%	51.0%
Not Sure/Don't know	22.3%	19.6%	19.9%
<b>N=</b>	<b>3,662</b>	<b>3,678</b>	<b>3,514</b>

- Based on the response to the survey, revenue would be increased the most by offering the hunting, turkey, waterfowl, and upland game bird package at a price of \$64.75.
- Only a small number of annual hunters (208) actually purchased all these permits in 2012.

**Table 25: Projected sales of Annual Hunting, Spring Turkey, Waterfowl, and Upland Bird Packages by previous privilege purchase.**

Current Hunters	Current Annual Hunters	Hunting, Turkey, Waterfowl, & Upland Bird Package Buyers		
		\$68.50	\$64.75	\$61.25
Annual Hunting Only	62,729	13,755	16,754	16,233
w/ Spring Turkey	1,318	833	720	888
w/ Waterfowl	2,307	1,311	1,413	1,493
w/ Upland Bird	5,030	1,883	2,386	2,384
w/ Turkey & Waterfowl	111	20	42	99
w/ Turkey and Upland	228	164	43	153
w/ Waterfowl & Upland	2,309	1,428	1,693	1,565
w/ All Tags	208	140	121	192
<b>Tag Buyer Total</b>	<b>74,240</b>	<b>19,533</b>	<b>23,171</b>	<b>23,008</b>
Would Not Purchase*		54,707	51,069	51,232

\*Assumes they would purchase Annual Hunting license.

**Table 26: Projected revenue from sales of Annual Hunting, Spring Turkey, Waterfowl, and Upland Bird Packages by previous privilege purchase.**

Current Hunters	Current Annual Hunters	Hunting, Turkey, Waterfowl, & Upland Bird Package Buyers		
		\$68.50	\$64.75	\$61.25
Annual Hunting Only	\$1,850,506	\$942,234	\$1,084,852	\$994,260
w/ Spring Turkey	\$68,536	\$57,040	\$46,628	\$54,412
w/ Waterfowl	\$94,587	\$89,773	\$91,461	\$91,451
w/ Upland Bird	\$191,140	\$128,985	\$154,477	\$146,014
w/ Turkey & Waterfowl	\$7,049	\$1,351	\$2,694	\$6,056
w/ Turkey and Upland	\$13,794	\$11,221	\$2,770	\$9,397
w/ Waterfowl & Upland	\$114,296	\$97,785	\$109,643	\$95,886
w/ All Tags	\$14,976	\$9,620	\$7,826	\$11,785
<b>Tag Buyer Total</b>	<b>\$2,354,883</b>	<b>\$1,338,009</b>	<b>\$1,500,351</b>	<b>\$1,409,261</b>
Would Not Purchase*		\$1,613,857	\$1,506,522	\$1,511,334
<b>Total Revenue</b>	<b>\$2,354,883</b>	<b>\$2,951,866</b>	<b>\$3,006,874</b>	<b>\$2,920,595</b>

\*Assumes they would purchase Annual

### Annual Angling, Shellfish, and Combined Angling Tag Package

- 56.1% said they would purchase the angling, shellfish, and combined angling tag package at a price of \$56.50.
- The percent saying 'yes' at \$59.75 was not statistically different from the proportion who said they would buy at \$63.25 even though it appears to be lower.

**Table 27: Annual Angling, Shellfish, and Combined Angling Tag Package (Q9).**

Would you purchase...?	\$63.25	\$59.75	\$56.50
Yes, would purchase	50.3%	48.9%	56.1%
No, would not purchase	28.6%	33.2%	26.5%
Not Sure/Don't know	21.1%	17.9%	17.5%
<b>N=</b>	<b>3,669</b>	<b>3,687</b>	<b>3,523</b>

- Based on previous purchase history, it appears that revenue would be greatest at the price of \$63.25.

**Table 28: Projected sales of Annual Angling, Shellfish, and Combined Angling Tag Packages by previous privilege purchase.**

Current Anglers	Current Annual Anglers	Angling, Shellfish, & Combined Angling Tag Package Buyers		
		\$63.25	\$59.75	\$56.50
Annual Angling Only	129,248	49,951	57,672	63,051
w/ Shellfish only	16,451	12,506	13,802	15,223
w/ CAT only	60,779	30,262	33,898	33,073
w/ Shellfish & CAT	27,658	25,379	24,572	25,640
<b>Tag Buyer Total</b>	<b>234,136</b>	<b>118,098</b>	<b>129,944</b>	<b>136,987</b>
Would Not Purchase*		116,038	104,192	97,149

\*Assumes they would purchase Annual Angling license.

**Table 29: Projected revenue from sales of Annual Angling, Shellfish, and Combined Angling Tag Packages by previous privilege purchase.**

Current Anglers	Current Annual Anglers	Angling, Shellfish, & Combined Angling Tag Package Buyers		
		\$63.25	\$59.75	\$56.50
Annual Fishing Only	\$4,265,184	\$3,159,420	\$3,445,910	\$3,562,379
w/ Shellfish only	\$658,040	\$791,006	\$824,671	\$860,119
w/ CAT only	\$3,616,351	\$1,914,061	\$2,025,423	\$1,868,622
w/ Shellfish & CAT	\$1,839,257	\$1,605,233	\$1,468,172	\$1,448,664
<b>Tag Buyer Total</b>	<b>\$10,378,832</b>	<b>\$7,469,719</b>	<b>\$7,764,176</b>	<b>\$7,739,784</b>
Would Not Purchase*		\$3,829,243	\$3,438,324	\$3,205,906
<b>Total Revenue</b>	<b>\$10,378,832</b>	<b>\$11,298,962</b>	<b>\$11,202,500</b>	<b>\$10,945,690</b>

\*Assumes they would purchase Annual

## Youth Combination License

Question 11 of the resident survey asked respondents how likely they would be to purchase a proposed youth combination license that would replace the current youth angling and youth hunting licenses. As a secondary question they were asked how likely they would be to add an additional youth tag or validation to that license. The preceding question (Q10) was a filter question that asked whether they had youth in their household who might hunt or fish in 2014.

For this analysis only the responses of the 19.4% of respondents who answered 'yes' to Question 10 are considered (i.e. respondents with a youth residing in their household). For the secondary privilege question, only respondents who reported that there are 'very likely' to purchase a youth license (Question 11a) were considered. The base of analysis is the number of youth hunter and angler licenses that were sold in 2013 at their current price.

**Table 30: Youth in household who may want to hunt or fish next year (Q10).**

Youth in Household	%
Yes	19.4%
No	80.6%
<b>N= 10,840</b>	

- At \$10 and \$15 the percent of respondents who would be "very likely" to purchase the youth combination is not statistically different (46.2% and 45.8%) respectively. These prices are close to the current prices of the youth angling and hunting licenses.
- At \$20, the proportion who answered 'very likely' fell to 37%.

**Table 31: Likelihood of purchasing Youth License if youth in household (Q11a).**

Youth License	\$10	\$15	\$20
Very unlikely	13.1%	15.4%	14.2%
Somewhat unlikely	4.0%	5.4%	7.8%
Not sure/ Don't know	9.1%	10.1%	10.3%
Somewhat likely	27.5%	23.4%	30.6%
Very likely	46.2%	45.8%	37.0%
<b>N=</b>	<b>799</b>	<b>805</b>	<b>747</b>

- A significantly larger proportion of respondents who said they would be 'very likely' to purchase the license at \$20 indicated they would be 'very likely' to purchase a waterfowl or upland bird validation compared to those who would purchase the license at a lower price (Table 33 and Table 34). This indicates that hunters would be more likely to purchase the youth license at \$20 compared to anglers. Otherwise there is no statistical difference in the percent who were 'very likely' to purchase one of the youth privileges.

**Table 32: Likelihood of adding a \$5 Combined Angling Tag to Youth License if youth in household (Q11b).**

"Very Likely" to Purchase Youth License at Price of:	\$10	\$15	\$20
Very unlikely	8.1%	6.6%	8.7%
Somewhat unlikely	3.1%	3.1%	4.7%
Not sure/ Don't know	7.8%	8.5%	2.5%
Somewhat likely	16.8%	21.6%	23.9%
Very likely	64.2%	60.2%	60.1%
<b>N=</b>	<b>378</b>	<b>362</b>	<b>291</b>

Limited to respondents who were 'very likely' to purchase youth license.

**Table 33: Likelihood of adding a \$4 Waterfowl Validation to Youth License if youth in household (Q11b).**

"Very Likely" to Purchase Youth License at Price of:	\$10	\$15	\$20
Very unlikely	28.0%	35.2%	30.9%
Somewhat unlikely	18.2%	5.9%	6.0%
Not sure/ Don't know	18.4%	14.0%	10.4%
Somewhat likely	12.8%	21.9%	16.5%
Very likely	22.5%	23.0%	36.3%
<b>N=</b>	<b>363</b>	<b>345</b>	<b>279</b>

Limited to respondents who were 'very likely' to purchase youth license.

**Table 34: Likelihood of adding a \$4 Upland Game Bird Validation to Youth License if youth in household (Q11b).**

"Very Likely" to Purchase Youth License at Price of:	\$10	\$15	\$20
Very unlikely	25.6%	31.9%	26.7%
Somewhat unlikely	13.5%	5.3%	6.1%
Not sure/ Don't know	16.4%	13.8%	9.1%
Somewhat likely	16.1%	23.8%	21.4%
Very likely	28.5%	25.2%	36.8%
<b>N=</b>	<b>369</b>	<b>343</b>	<b>286</b>

Limited to respondents who were 'very likely' to purchase youth license.

### Projected Sales and Revenue

To estimate projected sales of the youth combination license, responses of hunters and anglers were considered separately. For hunters, the base of comparison was the 8,963 youth hunting licenses sold in 2013 at \$14.50. For anglers it was the 21,953 youth angling licenses at \$9.00.

- The number of youth licenses sold would be roughly the same at either \$10 or \$15.
- Revenue would be increased the most by charging \$20, but would likely result in fewer youth anglers.

**Table 35: Projected sales of youth combination licenses.**

	<b>\$10.00</b>	<b>\$15.00</b>	<b>\$20.00</b>
Youth License*	31,450	31,169	28,824
Daily privileges**			
Combined angling tag	19,902	19,106	17,280
Waterfowl validation	7,703	8,464	10,451
Upland game validation	9,660	9,127	11,061

\* Based on change in percent of respondents who would be "Very Likely" to purchase a youth license using 2013 youth hunter and angler sales as a base.

\*\* Based on respondents who would "Very likely" purchase a youth license and youth privilege

**Table 36: Projected revenue from youth combination license.**

	<b>\$10.00</b>	<b>\$15.00</b>	<b>\$20.00</b>
Youth License	\$314,495	\$467,537	\$576,486
Daily privileges			
Combined angling tag	\$99,509	\$95,529	\$86,399
Waterfowl validation	\$30,814	\$33,857	\$41,805
Upland game validation	\$38,638	\$36,508	\$44,243
<b>Total</b>	<b>\$483,456</b>	<b>\$633,431</b>	<b>\$748,934</b>

Based on respondents who would "Very likely" purchase a youth license and youth privilege

## Support for Other License and Policy Changes

### Change to 365-Day License

- Just under three-quarters (72%) of respondents favor a change to a 365-day license from the current fixed license year.
- Support was stronger among anglers than hunters.

**Table 37: Should ODFW switch to 365-day license (Q5)?**

In Favor	All	Anglers	Hunters
Yes	71.9%	72.1%	63.4%
Not Sure	9.1%	8.9%	11.2%
No	19.0%	19.0%	25.5%
<b>N=</b>	<b>11,009</b>	<b>10,376</b>	<b>8,555</b>

### Charge for Permanent Pioneer and Disabled Veterans Licenses

- A majority of respondents in all age groups said they would support introducing a nominal charge for the permanent Pioneer and disabled veterans licenses.
- Firm opposition to a charge increases with age with 46% of seniors saying they would not support such a measure vs. only 22% opposed in the 18 to 24 year old age group.

**Table 38: Support for nominal charge for Permanent Pioneer and Disabled Veteran licenses, by age (Q6).**

Age	N	Yes, I would support	No, I would not support	Not sure/Don't know
18 to 24	282	55.0%	22.4%	22.6%
25 to 34	1,450	59.1%	26.5%	14.3%
35 to 44	2,220	59.6%	28.0%	12.3%
45 to 54	2,344	61.4%	29.5%	9.1%
55 to 64	2,709	59.6%	33.0%	7.4%
65 and Over	2,004	50.3%	46.1%	3.5%
<b>Overall</b>	<b>10,954</b>	<b>57.8%</b>	<b>31.1%</b>	<b>11.1%</b>

### Unique Fishing Opportunities

- Less than 40% of anglers said they would be somewhat or very likely to participate in a raffle for unique fishing privileges such as the retention of oversized sturgeon or wild steelhead in certain water bodies.
- A greater proportion (41.7%) said they were very unlikely to participate in a raffle for such fishing privileges.
- If the privileges were auctioned off instead, roughly three-quarters would be very unlikely to participate.
- Less than eight percent of anglers would be likely to participate in an auction for unique fishing opportunities.

**Table 39: Likelihood of participation raffle/auction for unique fishing opportunities (Q12).**

Likelihood of Angler Participation	Raffle	Auction
Very unlikely	41.7%	74.2%
Somewhat unlikely	8.7%	7.6%
Not sure/ Don't know	10.7%	10.4%
Somewhat likely	19.5%	3.9%
Very likely	19.3%	3.9%
<b>N=</b>	<b>10,182</b>	<b>10,157</b>

- Avid anglers would be just as unlikely to participate in a raffle or auction for unique fishing opportunities as the average angler.

**Table 40: Avid Anglers, likelihood of participation raffle/auction for unique fishing opportunities (Q12).**

Likelihood of Avid Angler Participation	Raffle	Auction
Very unlikely	42.8%	72.9%
Somewhat unlikely	9.0%	9.0%
Not sure/ Don't know	9.6%	9.3%
Somewhat likely	18.3%	3.9%
Very likely	20.3%	5.0%
<b>N=</b>	<b>4,503</b>	<b>4,498</b>

#### Premier Controlled Hunts

- Two-thirds (67.6%) of hunters responded that they would apply for the proposed premier hunts in addition to tags they would otherwise apply for anyway.
- Only 2.3% said they would apply for them instead of the tags they normally apply for.
- Less than one in five (17.8%) said they wouldn't apply for a premier controlled hunt.
- The response of deer and elk hunters was also examined, but there was no statistical difference between their response and that of the general survey population.

**Table 41: Interest in premier controlled hunts (Q13).**

Premier Controlled Hunts	%
Would apply for in addition too....	67.6%
Would apply for instead of....	2.3%
Would not apply for	17.8%
Not Sure	12.3%
<b>N=</b>	<b>8,406</b>

### Frequency and Magnitude of Price Changes

- A majority of respondents (56.3%) indicated they would prefer more frequent but smaller price increases.
- Only 13.5% said they would like price increases to be less frequent and larger.

**Table 42: Preference for frequency and magnitude of future price increases (Q14).**

Price Increase Preference	%
More frequent smaller increases	56.3%
Less frequent larger increases	13.5%
Not Sure	30.2%
<b>N= 10,740</b>	

## Nonresident Survey Results

### Recent and Planned Activity

- Just under half (45.2%) of nonresident respondents reported fishing in the past 12 month.
- Less than one in five (18.7%) reported hunting in the past 12 months.
- Only 8% of nonresident respondents reported both fishing and hunting and 36% only fished.
- 44.7% of nonresidents said they neither fished nor hunted in Oregon in the past 12 months.
- Half (50.2%) of nonresident respondents said they planned to both fish and hunt in Oregon in 2014.
- 82% said the planned to either hunt or fish in Oregon in 2014.

**Table 43: Fished in Oregon in the past 12 months (Q1a).**

<b>Fished</b>	<b>%</b>
Yes	45.2%
No	54.8%
<b>N= 6,012</b>	

**Table 44: Hunted in Oregon in the past 12 months (Q3a).**

<b>Hunted</b>	<b>%</b>
Yes	18.7%
No	81.3%
<b>N= 5,986</b>	

**Table 45: Hunted and/or Fished in Oregon the past 12 months (Q1a and Q3a).**

<b>Hunted and/or Fished</b>	<b>%</b>
Both Hunted and Fished	8.0%
Fished Only	36.6%
Hunted Only	10.7%
Neither	44.7%
<b>N= 5,985</b>	

**Table 46: Plan to fish and/or hunt in Oregon in 2014 (Q15).**

<b>Hunt or Fish</b>	<b>%</b>
Both Hunt and Fish	50.2%
Fish Only	14.1%
Hunt Only	17.7%
Hunt or Fish	82.0%
<b>N= 6,058</b>	

- Nonresident respondents who reported fishing fished an average of 6.7 days over a 12 month period.
- Half fished three days or less.
- Nonresident hunters reported hunting an average of 8.8 days over a 12 month period and half hunted seven days or less.

**Table 47: Days fished in Oregon in past 12 months (Q1b).**

<b>Days Fished</b>	
Mean	6.7
Median	3
<b>N= 2,698</b>	

**Table 48: Days hunted in Oregon in past 12 months (Q3b).**

<b>Days Hunted</b>		<b>%</b>
Mean	8.8	
Median	7	
<b>N= 1,552</b>		

- Trout was by far the number one fish targeted by nonresident anglers (52.1%)
- Salmon and steelhead were the next most popular, with 29.9% and 26.7% reporting targeting these species.

**Table 49: Fish species targeted in Oregon by anglers during past 12 months (Q2).**

<b>Targeted Fish Species</b>	<b>%</b>
Trout (other than steelhead)	52.1%
Salmon	29.9%
Steelhead	26.7%
Bass	12.2%
Other	10.5%
Pan Fish	5.7%
Ocean Bottomfish	5.6%
Sturgeon	5.6%
Surfperch	1.9%
Tuna	1.4%
Halibut	1.3%
Walleye	0.9%
<b>N= 2,284</b>	

- Deer and elk were the most popular game species targeted by nonresident hunters followed closely by upland game bird.

**Table 50: Game species targeted in Oregon by hunters during past 12 months (Q4).**

Targeted Game Species	%
Elk	37.6%
Deer	37.4%
Upland Game Birds	31.1%
Waterfowl	22.8%
Cougar	6.5%
Bear	4.7%
Small Game	4.7%
Other	4.2%
Turkey	3.5%
<b>N= 1,556</b>	

## Multi-Year Licenses

The survey included three questions (Q6abc) where respondents were asked separately for angling, hunting, and combination licenses if they would purchase an annual, three-year, or five-year version of these. Each respondent was asked only to evaluate one version of these questions. However there were different nine versions in total randomly distributed across the survey sample, each with a different combination of prices for the three and five-year licenses. The annual licenses were always shown at their current price.

The response to these questions was analyzed using a discrete choice model to estimate relative probabilities that a sportsman would choose one of these licenses based on duration of license and price. This allows the share of preference for any of the possible options (annual, three-year, or five-year) to be calculated at any price. However, ODFW is not likely to offer both a three-year and a five-year license, therefore the analysis was conducted separately for each of these to estimate preference between the multi-year license and the annual license at the three price levels that were used in the survey questionnaire.

**NOTE:** *The percent of respondents saying they would purchase a multi-year license is larger, in some cases, than the proportion of sportsmen who purchase a license every year over a three or five year period. Unfortunately, there was no way to account for this in the analysis since ODFW does not currently sell a multi-year version of any of the licenses tested in the survey. As a result, the estimates of sales and revenue may be exaggerated.*

### Multi-Year Angling

The base used for the multi-year angling license analysis is the number of nonresident annual angler licenses sold in 2013 (14,994) applied to the estimated number of licenses purchased over a three or five year period<sup>2</sup> based on sales records provided by ODFW. The percent of nonresident annual anglers who would switch to the multi-year license is based on the discrete choice analysis of the response to Question 6a in the questionnaire.

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<sup>2</sup> For the three-year license 2010-2012 was used and 2008-2012 was used for the five-year analysis. We did not have complete records for 2013.

### Three-year fishing license

- Based on the discrete choice analysis, 15.4% of annual nonresident anglers would switch to a three-year angling license at the full value price of \$314.75; 25.8% would purchase the three year license if it were offered at the discounted price of \$271.
- Currently, an estimated 19.8% of nonresident annual anglers purchase in three out of three years.
- Nonresident angling license revenue would be increased by 16.4% by adding the three-year license at no discount (\$314.75) and by 20.5% if it were offered at \$271.

**Table 51: Projected Sales of 3-Year Angling License (Q6a).**

<b>Price Of 3-Year Angling License</b>	<b>\$271.00</b>	<b>\$287.00</b>	<b>\$314.75</b>
<b>Share of Preference: 3-Year License*</b>	<b>25.8%</b>	<b>21.5%</b>	<b>15.4%</b>
# Purchasing Annually over 3 Years	22,970	24,300	26,210
# Purchasing 3-Year License	7,998	6,667	4,757
Annual License Revenue over 3 Years**	\$3,478,283	\$3,679,742	\$3,968,973
3-Year License Revenue	\$2,151,413	\$1,900,214	\$1,487,875
<b>Total Projected Revenue over 3 years</b>	<b>\$5,629,696</b>	<b>\$5,579,956</b>	<b>\$5,456,847</b>
<b>Annualized Projected License Revenue</b>	<b>\$1,876,565</b>	<b>\$1,859,985</b>	<b>\$1,818,949</b>
<b>Current Annual License Revenue</b>	<b>\$1,563,125</b>	<b>\$1,563,125</b>	<b>\$1,563,125</b>
<b>% Change in Annual License Revenue</b>	<b>20.1%</b>	<b>19.0%</b>	<b>16.4%</b>
<b>Annualized Total Projected Revenue w/SFR \$</b>	<b>\$2,006,769</b>	<b>\$1,985,515</b>	<b>\$1,937,770</b>
<b>Current Annual Revenue w/SFR \$</b>	<b>\$1,665,234</b>	<b>\$1,665,234</b>	<b>\$1,665,234</b>
<b>% Change in Total Annual Revenue</b>	<b>20.5%</b>	<b>19.2%</b>	<b>16.4%</b>

\* Actual % purchasing 3/3 years was 19.8%

\*\* Assuming anglers purchasing annual licenses purchase an average of 1.69 licenses over 3 year period

### Five-year fishing license

- Given the choice between a five-year and an annual license, 4.3% of annual anglers would switch to the five-year license at the full price of \$523.25. This is close to the 3.4% of annual nonresident anglers who currently purchase five out of five years.
- 11.5% would purchase the five-year license at the discounted rate of \$451.50.
- Annual angling license revenue would increase by 8.1% if the five-year license were offered at the full value price (\$523.25) and by 17.5% if it were discounted to \$451.50.

**Table 52: Projected Sales of 5-Year Angling License (Q6a).**

Price Of 5-Year Angling License	\$451.50	\$478.25	\$523.25
<b>Share of Preference: 5-Year License*</b>	<b>11.5%</b>	<b>8.0%</b>	<b>4.3%</b>
# Purchasing Annually over 3 Years	38,518	40,029	41,660
# Purchasing 5-Year License	4,999	3,488	1,858
Annual License Revenue over 5 Years**	\$6,917,825	\$7,189,148	\$7,482,008
5-Year License Revenue	\$2,247,006	\$1,661,248	\$968,250
<b>Total Projected Revenue over 5 years</b>	<b>\$9,164,831</b>	<b>\$8,850,396</b>	<b>\$8,450,257</b>
<b>Annualized Projected License Revenue</b>	<b>\$1,832,966</b>	<b>\$1,770,079</b>	<b>\$1,690,051</b>
<b>Current Annual License Revenue</b>	<b>\$1,563,125</b>	<b>\$1,563,125</b>	<b>\$1,563,125</b>
<b>% Change in Annual License Revenue</b>	<b>17.3%</b>	<b>13.2%</b>	<b>8.1%</b>
<b>Annualized Total Projected Revenue w/SFR \$</b>	<b>\$1,957,388</b>	<b>\$1,887,758</b>	<b>\$1,800,452</b>
<b>Current Annual Revenue w/SFR \$</b>	<b>\$1,665,234</b>	<b>\$1,665,234</b>	<b>\$1,665,234</b>
<b>% Change in Total Annual Revenue</b>	<b>17.5%</b>	<b>13.4%</b>	<b>8.1%</b>

\* Actual % purchasing 5/5 years was 3.4%

\*\* Assuming anglers purchasing annual licenses purchase an average of 1.72 licenses over 5 year period

## Multi-Year Hunting

The base of comparison used for the multi-year hunting license analysis is the number of nonresident annual hunter licenses sold in 2013 (12,158) applied to the estimated number of licenses purchased over a three or five year period based on sales records provided by ODFW. The percent of annual hunters who would switch to the multi-year license is based on the discrete choice analysis of the response to Question 6b in the questionnaire.

### Three-year hunting license

- Based on the discrete choice model, 16.6% of nonresident annual hunters would switch to a three-year license at the full value price of \$417.50. Currently 18.7% purchase an annual hunting license in three out of three years.
- 27.2% would purchase a three year hunting license if it were discounted to \$358.25.
- Annual hunting license revenue would increase 14.5% if the three-year hunting license were offered at \$417.50 or by 16.9% if it were offered at \$358.25.

**Table 53: Projected Sales of 3-Year Hunting License (Q6b).**

Price Of 3-Year Hunting License	\$358.25	\$379.25	\$417.50
Share of Preference: 3-Year License*	27.2%	23.0%	16.6%
# Purchasing Annually over 3 Years	16,599	17,560	19,031
# Purchasing 3-Year License	6,212	5,251	3,780
Annual License Revenue over 3 Years**	\$3,675,908	\$3,888,863	\$4,214,434
3-Year License Revenue	\$2,213,115	\$1,980,804	\$1,570,798
<b>Total Projected Revenue over 3 years</b>	<b>\$5,889,023</b>	<b>\$5,869,667</b>	<b>\$5,785,232</b>
<b>Annualized Projected License Revenue</b>	<b>\$1,963,008</b>	<b>\$1,956,556</b>	<b>\$1,928,411</b>
<b>Current Annual License Revenue</b>	<b>\$1,683,883</b>	<b>\$1,683,883</b>	<b>\$1,683,883</b>
<b>% Change in Annual License Revenue</b>	<b>16.6%</b>	<b>16.2%</b>	<b>14.5%</b>
<b>Annualized Total Projected Revenue w/SFR \$</b>	<b>\$2,065,862</b>	<b>\$2,056,343</b>	<b>\$2,023,508</b>
<b>Current Annual Revenue w/SFR \$</b>	<b>\$1,766,922</b>	<b>\$1,766,922</b>	<b>\$1,766,922</b>
<b>% Change in Total Annual Revenue</b>	<b>16.9%</b>	<b>16.4%</b>	<b>14.5%</b>

\* Actual % purchasing 3/3 years was 18.7%

\*\* Assuming anglers purchasing annual licenses purchase an average of 1.6 licenses over 3 year period

### Five-year hunting license

- If a five-year nonresident hunting license were offered at its full value price of \$694.50, 7.7% of annual nonresident hunters would purchase it, according to the discreet choice analysis. This compares to 6.4% of hunters who currently purchase in five out of five years.
- 19% would purchase the five-year license if it were discounted to \$597.25.
- Annual nonresident hunting license revenue would be increased by 11.6% by offering a five-year hunting license at a price of \$694.50 or by 22.4% if were priced at \$597.25.

**Table 54: Projected Sales of 5-Year Hunting License (Q6b).**

Price Of 5-Year Hunting License	\$597.25	\$632.25	\$694.50
<b>Share of Preference: 5-Year License*</b>	<b>19.0%</b>	<b>13.9%</b>	<b>7.7%</b>
# Purchasing Annually over 3 Years	24,781	26,343	28,250
# Purchasing 5-Year License	5,812	4,250	2,343
Annual License Revenue over 5 Years**	\$6,819,813	\$7,249,728	\$7,774,616
5-Year License Revenue	\$3,459,848	\$2,678,727	\$1,622,521
<b>Total Projected Revenue over 5 years</b>	<b>\$10,279,661</b>	<b>\$9,928,454</b>	<b>\$9,397,136</b>
<b>Annualized Projected License Revenue</b>	<b>\$2,055,932</b>	<b>\$1,985,691</b>	<b>\$1,879,427</b>
<b>Current Annual License Revenue</b>	<b>\$1,683,883</b>	<b>\$1,683,883</b>	<b>\$1,683,883</b>
<b>% Change in Annual License Revenue</b>	<b>22.1%</b>	<b>17.9%</b>	<b>11.6%</b>
<b>Annualized Total Projected Revenue w/SFR \$</b>	<b>\$2,162,894</b>	<b>\$2,086,223</b>	<b>\$1,972,109</b>
<b>Current Annual Revenue w/SFR \$</b>	<b>\$1,766,922</b>	<b>\$1,766,922</b>	<b>\$1,766,922</b>
<b>% Change in Total Annual Revenue</b>	<b>22.4%</b>	<b>18.1%</b>	<b>11.6%</b>

\* Actual % purchasing 5/5 years was 6.4%

\*\* Assuming anglers purchasing annual licenses purchase an average of 1.99 licenses over 5 year period

### Multi-Year Combination

The base of comparison used for the multi-year combination license analysis is the estimated number of nonresident sportsmen who purchased both a hunting and a fishing license in 2013 (2,068) applied to the estimated number of licenses purchased over a three or five year period based on sales records provided by ODFW. The percent of annual sportsmen who would switch to the multi-year license is based on the discrete choice analysis of the response to Question 6c in the questionnaire.

#### Three-year combination license

- Based on the discrete choice model, 15.5% of nonresident sportsmen who purchase both hunting and fishing licenses would purchase a three-year combination license at the full value price of \$683. 27.3% would do so if the price was discounted to \$584.
- Annual license revenue from this group would increase by 16.8% if a three-year combination license were introduced at a price of \$683. It would be increased by 21.8% at a price of \$584.

**Table 55: Projected Sales of 3-Year Combination License (Q6c).**

Price Of 3-Year Combination License	\$584.00	\$618.25	\$683.00
Share of Preference: 3-Year License*	27.3%	22.6%	15.5%
# Purchasing Annually over 3 Years	3,134	3,334	3,642
# Purchasing 3-Year License	1,175	976	668
Annual License Revenue over 3 Years**	\$1,024,125	\$1,089,291	\$1,190,039
3-Year License Revenue	\$684,086	\$601,440	\$454,661
<b>Total Projected Revenue over 3 years</b>	<b>\$1,708,211</b>	<b>\$1,690,731</b>	<b>\$1,644,700</b>
Annualized Projected License Revenue	\$569,404	\$563,577	\$548,233
Current Annual License Revenue	\$469,397	\$469,397	\$469,397
% Change in Annual License Revenue	21.3%	20.1%	16.8%
Annualized Total Projected Revenue w/SFR \$	\$605,949	\$598,707	\$581,176
Current Annual Revenue w/SFR \$	\$497,602	\$497,602	\$497,602
% Change in Total Annual Revenue	21.8%	20.3%	16.8%

\* Actual % purchasing 3/3 years was 10.2%

\*\* Assuming anglers purchasing annual licenses purchase an average of 1.44 licenses over 3 year period

### Five-year combination license

- Based on the discrete choice model of the combination license, 6.3% of nonresident sportsmen who both hunt and fish would purchase a five-year license if it were offered at the full value price of \$1,137. This would increase to 18.1% if the five-year license were discounted to \$973.25.
- Currently, only 2.6% of these customers purchase in all five out of five years.
- Annual license revenue from this group would be increased by 11.6%, according to the model, if the five-year license were offered at a price of \$1,137 or by 26.2% if it were offered at \$973.25.

**Table 56: Projected Sales of 5-Year Combination License (Q6c).**

<b>Price Of 5-Year Combination License</b>	<b>\$973.25</b>	<b>\$1,030.50</b>	<b>\$1,137.00</b>
<b>Share of Preference: 5-Year License*</b>	<b>18.1%</b>	<b>12.8%</b>	<b>6.3%</b>
# Purchasing Annually over 5 Years	4,799	5,113	5,489
# Purchasing 5-Year License	1,062	748	372
Annual License Revenue over 5 Years**	\$1,921,756	\$2,047,493	\$2,198,114
3-Year License Revenue	\$1,031,251	\$769,130	\$421,905
<b>Total Projected Revenue over 5 years</b>	<b>\$2,953,007</b>	<b>\$2,816,623</b>	<b>\$2,620,019</b>
<b>Annualized Projected License Revenue</b>	<b>\$590,601</b>	<b>\$563,325</b>	<b>\$524,004</b>
<b>Current Annual License Revenue</b>	<b>\$469,397</b>	<b>\$469,397</b>	<b>\$469,397</b>
<b>% Change in Annual License Revenue</b>	<b>25.8%</b>	<b>20.0%</b>	<b>11.6%</b>
<b>Annualized Total Projected Revenue w/SFR \$</b>	<b>\$628,179</b>	<b>\$598,131</b>	<b>\$555,490</b>
<b>Current Annual Revenue w/SFR \$</b>	<b>\$497,602</b>	<b>\$497,602</b>	<b>\$497,602</b>
<b>% Change in Total Annual Revenue</b>	<b>26.2%</b>	<b>20.2%</b>	<b>11.6%</b>

\* Actual % purchasing 5/5 years was 2.6%

\*\* Assuming anglers purchasing annual licenses purchase an average of 1.76 licenses over 5 year period

## One-Day Combination License

Question 7 of the nonresident survey was a two part question that first asked respondents whether they would purchase a Daily Combination license at a price of \$10, \$15, or \$20 depending on version of the questionnaire they received. This license would be a replacement for all current short term licenses currently sold by ODFW. If a respondent answered “yes” then they were asked if they would also add any of the following daily privileges to accompany it: Combined Angling Tag, Waterfowl Validation, and Upland Game Bird Validation.

- Over half (56.2%) of nonresidents would purchase a daily combination license if it were priced at \$10.
- At \$20, 42.6% of nonresidents would purchase a daily combination license.

**Table 57: Would you purchase a daily combination license (Q7a)?**

Price Daily Combination	\$10	\$15	\$20
Yes, I would purchase	56.2%	47.8%	42.6%
No, I would not purchase	22.0%	28.4%	33.3%
Not sure/Do not know	21.8%	23.8%	24.1%
<b>N=</b>	<b>1,979</b>	<b>1,893</b>	<b>2,011</b>

- Respondents who said they would purchase the daily license at a higher price also said they were more likely to add a waterfowl or upland game bird validation. We would expect this since those willing to pay a higher price for the daily license are probably more avid sportsmen. However, the differences were not statistically significant for the most part.
- Just over two out of five respondents (41.5%) who said they would purchase the one-day combo license said they would be ‘very likely’ to also add a combined angling tag.
- 24% would be very likely to add a waterfowl validation and 28.6% would be very likely to add an upland game bird validation.

**Table 58: Likelihood of purchasing an additional one-day privilege to accompany the one-day license (Q7b).**

Likelihood of adding one day tag/validation	Combined Angling Tag \$7	Waterfowl Validation \$4	Upland Game Bird Validation \$4
Very unlikely	16.1%	37.9%	33.7%
Somewhat unlikely	6.0%	9.4%	7.6%
Not sure/ Don't know	12.1%	13.1%	11.5%
Somewhat likely	24.3%	15.6%	18.6%
Very likely	41.5%	24.0%	28.6%
<b>N=</b>	<b>2,656</b>	<b>2,632</b>	<b>2,640</b>

*Only asked if answered 'yes, I would purchase' daily combination license.*

## Sales and Revenue Projections

Tables 58 and 59 show projected sales and revenue of nonresident daily combination licenses and privileges based on the response benchmarked to the current number of daily license sales (180,986 nonresident days in 2013). The vast majority of these were daily angling licenses (171,176 days) which

are sold at just over the middle price of \$15 used in the questionnaire and therefore the response at this price is used to benchmark estimate changes in sales. Benchmarking the daily hunters is problematic due to the fact that currently ODFW only sells a three-day license.

- Revenue from daily licenses and privileges would be greatest at a price of \$20.
- This should be weighed against the potential negative economic impact of fewer nonresident hunters and anglers coming to Oregon if the price is raised.

**Table 59: Projected daily combination license and tag sales.**

	<b>\$10.00</b>	<b>\$15.00</b>	<b>\$20.00</b>
Daily Combination License *	196,125	180,986	171,546
Daily privileges**			
Combined angling tag	85,232	75,541	65,811
Waterfowl validation	33,888	57,712	41,111
Upland game validation	38,785	70,109	50,317

\* Based on percent of respondents answering 'yes' applied to 180,986 days of daily licenses purchased by nonresident sportsmen in 2013.

\*\* Based on respondents who would purchase a daily license would be "Very likely" daily privilege

**Table 60: Projected revenue from daily combination license and tag sales.**

	<b>\$10.00</b>	<b>\$15.00</b>	<b>\$20.00</b>
Daily Combination License	\$1,961,246	\$2,714,792	\$3,430,915
Daily privileges*			
Combined angling tag	\$596,626	\$528,789	\$460,680
Waterfowl validation	\$135,552	\$230,849	\$164,444
Upland game validation	\$155,142	\$280,437	\$201,269

\*Based on respondents who would purchase a daily license would be "Very likely" daily privilege

## License/Tag Packages

Question 8 of the nonresident survey asked respondents whether they would purchase any of three possible license, tag, and validation packages at a discounted price from the full value of the individual privileges. There were three versions of this question with different discounted prices that were randomly assigned to each respondent in order to estimate a demand curve for the proposed packages. The three proposed packages are:

1. Spring or fall black bear and cougar tags only (would require separate purchase of a hunting license).
2. Annual hunting license with spring turkey tag, waterfowl validation, and upland game bird validation.
3. Annual angling license with shellfish license and combined angling tag.

Responses to this question were analyzed by the recent purchase history of respondents in order to account for sportsmen who are already purchasing these privileges at their full price.

### Black Bear and Cougar Tag Package

- Only 10% would purchase the bear and cougar package if it were offered for \$177.25.
- 14.5% would purchase it at the middle price of \$157.50 but this proportion does not increase significantly if the price were lowered further to \$128.

**Table 61: Spring or fall Black Bear and Cougar Tag Package (Q8).**

Would you purchase...?	\$177.25	\$157.50	\$128.00
Yes, would purchase	10.0%	14.5%	14.9%
No, would not purchase	70.8%	68.4%	68.8%
Not Sure/Don't know	19.2%	17.1%	16.3%
<b>N=</b>	<b>1,958</b>	<b>1,881</b>	<b>1,991</b>

- Based on the previous privilege purchases of annual nonresident hunters saying they would purchase the black bear and cougar tag package, sales and revenue would be greatest at either \$128 but revenue would be greatest at a price of \$157.50 (Table 61 and Table 62).

**Table 62: Projected sales of Black Bear & Cougar Tag Packages by previous license and privilege purchase.**

Current Hunters	Current Annual Hunters	Black Bear & Cougar Tag Package Buyers		
		\$177.25	\$157.50	\$128.00
Annual Hunting Only	12,464	1,312	1,767	1,825
w/ Bear **	9	N/A	9	N/A
w/ Cougar **	457	259	95	125
w/ Bear and Cougar**	11	N/A	N/A	N/A
<b>Tag Buyer Total</b>	<b>12,941</b>	<b>1,571</b>	<b>1,871</b>	<b>1,950</b>
Would Not Purchase*		11,370	11,070	10,991

\*Assumes they would purchase Annual

\*\* Sample too small to be reliable.

**Table 63: Projected revenue from sales of Black Bear and Cougar Tag Packages by previous privilege purchase.**

Current Hunters	Current Annual Hunters	Black Bear & Cougar Tag Package Buyers		
		\$177.25	\$157.50	\$128.00
Annual Hunting Only	\$1,850,904	\$427,446	\$540,702	\$504,700
w/ Bear **	\$3,051	N/A	\$2,754	N/A
w/ Cougar **	\$74,491	\$84,286	\$28,919	\$34,482
w/ Bear and Cougar**	\$3,889	N/A	N/A	N/A
<b>Tag Buyer Total</b>	<b>\$1,932,335</b>	<b>\$511,732</b>	<b>\$572,374</b>	<b>\$539,181</b>
Would Not Purchase*		\$1,688,455	\$1,643,969	\$1,632,160
<b>Total Revenue</b>	<b>\$1,932,335</b>	<b>\$2,200,187</b>	<b>\$2,216,343</b>	<b>\$2,171,341</b>

\*Assumes they would purchase Annual

\*\* Sample too small to be reliable.

#### Hunting, Turkey, Waterfowl, and Upland Bird Package

- At a price of \$243.75, 13% of nonresidents would purchase the hunting, spring turkey, waterfowl, and upland game bird package according to the response to the survey.
- 22.4% would purchase at a price of \$205.25, which is not statistically different from the 20.3% who would purchase at a price of \$230.75.

**Table 64: Annual Hunting License, Spring Turkey Tag, Waterfowl Validation, and Upland Bird Validation (Q8).**

Would you purchase...?	\$243.75	\$230.75	\$205.25
Yes, would purchase	13.0%	20.3%	22.4%
No, would not purchase	64.7%	59.9%	59.3%
Not Sure/Don't know	22.5%	19.9%	18.9%
<b>N=</b>	<b>1,961</b>	<b>1,879</b>	<b>1,994</b>

- Based on the response to the survey by nonresident annual hunters, revenue and sales would be the greatest by offering the hunting, turkey, waterfowl, and upland game bird package at a price of \$230.75 (Tables 64 and 65).
- Very few annual nonresident hunters actually purchase these tags separately (Table 64).

**Table 65: Projected sales of Annual Hunting, Spring Turkey, Waterfowl, and Upland Bird Packages by previous privilege purchase.**

Current Hunters	Current Annual Hunters	Hunting, Turkey, Waterfowl, & Upland Bird Package Buyers		
		\$243.75	\$230.75	\$205.25
Annual Hunting Only	12,899	2,983	3,892	3,211
w/ Spring Turkey **	5	5	N/A	5
w/ Waterfowl **	7	N/A	N/A	7
w/ Upland Bird **	14	1	N/A	13
w/ Turkey & Waterfowl **	0	N/A	N/A	N/A
w/ Turkey and Upland **	0	N/A	N/A	N/A
w/ Waterfowl & Upland **	14	N/A	N/A	14
w/ All Tags **	2	N/A	N/A	N/A
<b>Tag Buyer Total</b>	<b>12,941</b>	<b>2,988</b>	<b>3,892</b>	<b>3,250</b>
Would Not Purchase*		9,953	9,049	9,691

\*Assumes they would purchase Annual

\*\* Sample too small to be reliable.

**Table 66: Projected revenue from sales of Annual Hunting, Spring Turkey, Waterfowl, and Upland Bird Packages by previous privilege purchase.**

Current Hunters	Current Annual Hunters	Hunting, Turkey, Waterfowl, & Upland Bird Package Buyers		
		\$243.75	\$230.75	\$205.25
Annual Hunting Only	\$1,915,502	\$726,990	\$898,135	\$659,131
w/ Spring Turkey **	\$1,130	\$1,219	N/A	\$1,026
w/ Waterfowl **	\$1,309	N/A	N/A	\$1,437
w/ Upland Bird **	\$2,618	\$146	N/A	\$2,640
w/ Turkey & Waterfowl **	\$0	N/A	N/A	N/A
w/ Turkey and Upland **	\$0	N/A	N/A	N/A
w/ Waterfowl & Upland **	\$2,618	N/A	N/A	\$2,874
w/ All Tags **	\$529	N/A	N/A	N/A
<b>Tag Buyer Total</b>	<b>\$1,923,706</b>	<b>\$728,355</b>	<b>\$898,135</b>	<b>\$667,108</b>
Would Not Purchase*		\$1,478,002	\$1,343,741	\$1,439,081
<b>Total Revenue</b>	<b>\$1,923,706</b>	<b>\$2,206,357</b>	<b>\$2,241,875</b>	<b>\$2,106,188</b>

\*Assumes they would purchase Annual

\*\* Sample too small to be reliable.

### Annual Angling, Shellfish, and Combined Angling Tag Package

- 35.4% of nonresident sportsmen would purchase the angling and shellfish package at a price of \$122.50.
- Roughly the same amount would purchase the package at a price of \$145.50 (23%) as would purchase it at 26.6%.

**Table 67: Annual Angling, Shellfish, and Combined Angling Tag Package (Q8).**

Would you purchase...?	\$145.50	\$138.00	\$122.50
Yes, would purchase	23.0%	26.6%	35.4%
No, would not purchase	53.7%	47.7%	47.0%
Not Sure/Don't know	25.2%	25.3%	18.4%
<b>N=</b>	<b>1,967</b>	<b>1,876</b>	<b>1,998</b>

- Based on the response of annual nonresident anglers, revenue would be slightly higher at a price of \$138 compared to \$145.50.
- However, the number of angling and shellfish packages sold would be much greater at \$138 compared to at \$145.50.

**Table 68: Projected sales of Annual Angling, Shellfish, and Combined Angling Tag Packages by previous privilege purchase.**

Current Anglers	Current Annual Anglers	Angling, Shellfish, & Combined Angling Tag Package Buyers		
		\$145.50	\$138.00	\$122.50
Annual Fishing Only	5,845	1,476	1,425	1,544
w/ Shellfish	6,188	2,401	1,623	3,055
w/ CAT	5,045	1,174	2,526	2,867
w/ Shellfish & CAT	1,626	519	1,507	960
<b>Tag Buyer Total</b>	<b>18,704</b>	<b>5,570</b>	<b>7,080</b>	<b>8,426</b>
Would Not Purchase*		13,134	11,624	10,278

\*Assumes they would purchase Annual

**Table 69: Projected revenue from sales of Annual Angling, Shellfish, and Combined Angling Tag Packages by previous privilege purchase.**

Current Anglers	Current Annual Anglers	Angling, Shellfish, & Combined Angling Tag Package Buyers		
		\$145.50	\$138.00	\$122.50
Annual Fishing Only	\$621,031	\$214,724	\$196,619	\$189,099
w/ Shellfish	\$784,329	\$349,320	\$223,911	\$374,299
w/ CAT	\$669,724	\$170,871	\$348,655	\$351,159
w/ Shellfish & CAT	\$249,185	\$75,519	\$207,902	\$117,614
<b>Tag Buyer Total</b>	<b>\$2,324,269</b>	<b>\$810,433</b>	<b>\$977,088</b>	<b>\$1,032,172</b>
Would Not Purchase*		\$1,395,489	\$1,235,013	\$1,092,049
<b>Total Revenue</b>	<b>\$2,324,269</b>	<b>\$2,205,922</b>	<b>\$2,212,101</b>	<b>\$2,124,221</b>

\*Assumes they would purchase Annual

## Youth Combination License

Question 10 of the nonresident survey asked respondents how likely they would be to purchase a proposed youth combination license that would replace the current youth angling and youth hunting licenses. As a secondary question they were asked how likely they would be to add an additional youth tag or validation to that license. The preceding question (Q10) was a filter question that asked whether they had youth in their household who might hunt or fish in 2014.

For this analysis only the responses of the 13.7% of respondents who answered 'yes' to Question 9 are considered. For the secondary privilege question, only the responses of those who answered 'very likely' to Question 10a are considered. The base of analysis is the number of nonresident youth hunter and angler licenses that were sold in 2013 at their current price.

**Table 70: Youth in household who may want to hunt or fish next year (Q9).**

Youth in Household	%
Yes	13.7%
No	86.3%
<b>N= 5,818</b>	

- Based on the response, the percent who would purchase the youth license would be greatest at the highest price of \$20. However, there was no statistical difference in the responses at the three prices.

**Table 71: Likelihood of purchasing Youth License if youth in household (Q10a).**

Youth License	\$10	\$15	\$20
Very unlikely	8.4%	13.3%	10.1%
Somewhat unlikely	5.9%	3.0%	6.7%
Not sure/ Don't know	8.6%	21.8%	7.8%
Somewhat likely	31.7%	27.3%	20.1%
Very likely	45.4%	34.6%	55.3%
<b>N=</b>	<b>328</b>	<b>294</b>	<b>332</b>

- Over half (57.7%) of respondents who would be very likely to purchase a youth license would also be very likely to add a combined angling tag.
- Just under half (46.5%) would be very likely to add an upland bird validation and 38.5% would be very likely to add a waterfowl validation.

**Table 72: Likelihood of adding a tag or validation to the youth combination license (Q10b).**

Likelihood of adding one day tag/validation	Combined Angling Tag \$7	Waterfowl Validation \$4	Upland Game Bird Validation \$4
Very unlikely	12.7%	31.6%	26.0%
Somewhat unlikely	4.9%	8.8%	6.8%
Not sure/ Don't know	10.1%	8.9%	8.5%
Somewhat likely	14.6%	12.2%	12.3%
Very likely	57.7%	38.5%	46.5%
<b>N=</b>	<b>382</b>	<b>377</b>	<b>385</b>

*Limited to respondents who were 'very likely' to purchase youth license.*

## Projected Sales and Revenue

The response to the nonresident youth license question is benchmarked to the number of nonresident youth licenses sold in 2012 at \$20, which was the highest price respondents saw in the survey. This likely understates the number that would purchase this license, however, since the youth hunting license currently is sold for \$27.50.

- Since the percent saying they would be very likely to purchase the license was statistically the same at all prices, it can be assumed that then number of licenses sold would not be much changed by lowering the price.
- Revenue would be greatest at the highest price of \$20, but below current revenue levels, especially considering that some youth have been purchasing both the hunting and the fishing license.

**Table 73: Projected sales of youth combination licenses.**

	<b>\$10.00</b>	<b>\$15.00</b>	<b>\$20.00</b>
Youth License*	2,245	1,977	2,493
Daily privileges**			
Combined angling tag	1,143	1,185	1,537
Waterfowl validation	808	769	1,001
Upland game validation	1,031	834	1,234

\* Based on change in percent of respondents who would be "Very Likely" to purchase a youth license and estimated nonresident sportsmen with youth in household.

\*\* Based on respondents who would "Very likely" purchase a youth license and youth privilege

**Table 74: Projected revenue from youth combination license.**

	<b>\$10.00</b>	<b>\$15.00</b>	<b>\$20.00</b>
Youth License	\$22,450	\$29,652	\$49,860
Daily privileges			
Combined angling tag	\$5,713	\$5,923	\$7,687
Waterfowl validation	\$3,233	\$3,076	\$4,005
Upland game validation	\$4,124	\$3,337	\$4,937
<b>Total</b>	<b>\$35,520</b>	<b>\$41,988</b>	<b>\$66,489</b>

Based on respondents who would "Very likely" purchase a youth license and youth privilege

## Restructured Nonresident Angling and CAT

Question 13 of the nonresident survey was designed to estimate the impacts of restructuring the price of the nonresident annual angling license and combined angling tag. There were nine different combinations of annual angling license price and total price with combined angling tag tests, with each respondent only seeing one of these. Respondents were asked whether they would purchase an annual angling license on its own or with a combined angling tag or neither. The number who would purchase each at the different combinations was estimated using discrete choice analysis benchmarked to the number of nonresident anglers who purchased the license and tag in 2013.

Tables 74-76 show the estimated change in nonresident annual anglers and revenue that would occur at each price combination. An assumption made for this analysis is that the number of nonresident annual anglers would be driven by the price of the annual angling license alone, and that the total price with the combined angling tag would only drive the proportion of those anglers who would also purchase the tag.

- As expected, the greatest increase in nonresident annual anglers (894) would occur with the license priced at \$65 (Table 76).
- The greatest number of annual nonresident anglers who would also purchase the combined angling tag (9,002) would occur with the license priced at \$95 and total price with the tag at \$112.75 (Table 74). This is the price combination where the marginal cost of adding a tag is the lowest (\$17.75).
- All price combinations would result in a reduction in license revenue, but the smallest loss (\$47,846) would occur with a license price of \$95 and a total price with tag of \$132.75 (Table 74).

**Table 75: Sales and revenue from nonresident annual angling license and combined angling tag with annual angling license price of \$95.00 (Q13).**

	<u>Actual 2013</u>	<u>Proposed New Price</u>		
<b>Price: Annual Angling License</b>	<b>\$106.25</b>		<b>\$95.00</b>	
<b>Price: Annual Angling w/CAT</b>	<b>\$132.75</b>	<b>\$132.75</b>	<b>\$122.75</b>	<b>\$112.75</b>
Annual Angling Licenses Only	6,376	6,627	6,333	6,037
Annual Angling w/CAT	8,411	8,411	8,706	9,002
Total Annual Anglers	14,787		15,038	
<b>Change in Total Annual Anglers</b>			<b>251</b>	
License Revenue	\$1,794,010	\$1,746,164	\$1,670,231	\$1,588,431
<b>Change in License Revenue</b>		<b>-\$47,846</b>	<b>-\$123,779</b>	<b>-\$205,579</b>

**Table 76: Sales and revenue from nonresident annual angling license and combined angling tag with annual angling license price of \$80.00 (Q13).**

	<u>Actual 2013</u>	<u>Proposed New Price</u>		
<b>Price: Annual Angling License</b>	<b>\$106.25</b>		<b>\$80.00</b>	
<b>Price: Annual Angling w/CAT</b>	<b>\$132.75</b>	<b>\$132.75</b>	<b>\$122.75</b>	<b>\$112.75</b>
Annual Angling Licenses Only	6,376	6,956	6,669	6,376
Annual Angling w/CAT	8,411	8,411	8,698	8,991
Total Annual Anglers	14,787		15,367	
<b>Change in Total Annual Anglers</b>			<b>580</b>	
License Revenue	\$1,794,010	\$1,673,009	\$1,601,171	\$1,523,780
<b>Change in License Revenue</b>		<b>-\$121,002</b>	<b>-\$192,839</b>	<b>-\$270,230</b>

**Table 77: Sales and revenue from nonresident annual angling license and combined angling tag with annual angling license price of \$65.00 (Q13).**

	<u>Actual 2013</u>	<u>Proposed New Price</u>		
<b>Price: Annual Angling License</b>	<b>\$106.25</b>		<b>\$65.00</b>	
<b>Price: Annual Angling w/CAT</b>	<b>\$132.75</b>	<b>\$132.75</b>	<b>\$122.75</b>	<b>\$112.75</b>
Annual Angling Licenses Only	6,376	7,270	6,996	6,713
Annual Angling w/CAT	8,411	8,411	8,685	8,968
Total Annual Anglers	14,787		15,681	
<b>Change in Total Annual Anglers</b>			<b>894</b>	
License Revenue	\$1,794,010	\$1,589,088	\$1,520,786	\$1,447,462
<b>Change in License Revenue</b>		<b>-\$204,922</b>	<b>-\$273,225</b>	<b>-\$346,548</b>

## Support for Other License and Policy Changes

### Change to 365-Day License

- Just under three-quarters (72.2%) of respondents favor a change to a 365-day license from the current fixed license year.
- Support was slightly stronger among anglers than hunters.

**Table 78: Should ODFW switch to 365-day license (Q5)?**

In Favor	All	Anglers	Hunters
Yes	72.2%	72.6%	70.8%
Not Sure	15.0%	14.8%	11.6%
No	12.8%	12.5%	17.5%
	<b>N= 5,957</b>	<b>3,827</b>	<b>3,204</b>

### Unique Fishing Opportunities

- Only 15.6% of nonresident anglers said they would be very likely to participate in a raffle for unique fishing privileges such as the retention of oversized sturgeon or wild steelhead in certain water bodies.
- Only 4.2% said they would be very unlikely to participate in an auction for such fishing privileges.
- Nearly half (47.9%) would be very unlikely to participate in a raffle and almost three-quarters (72.6%) said they would be very unlikely to participate in an auction for unique fishing privileges.

**Table 79: Likelihood of participation raffle/auction for unique fishing opportunities (Q11).**

Likelihood of Participation	Raffle	Auction
Very unlikely	47.9%	72.6%
Somewhat unlikely	8.0%	8.0%
Not sure/ Don't know	13.1%	12.1%
Somewhat likely	15.5%	3.1%
Very likely	15.6%	4.2%
	<b>N= 3,705</b>	<b>3,697</b>

- Avid anglers would be even less likely to participate in either a raffle or an auction for unique privileges.

**Table 80: Avid Anglers, likelihood of participation raffle/auction for unique fishing opportunities (Q11).**

Likelihood of Participation	Raffle	Auction
Very unlikely	52.8%	77.7%
Somewhat unlikely	8.9%	6.3%
Not sure/ Don't know	11.6%	10.6%
Somewhat likely	13.6%	3.4%
Very likely	13.1%	2.0%
	<b>N= 1,249</b>	<b>1,247</b>

### Premier Controlled Hunts

- Roughly six out of ten (59.4%) nonresident hunters said they would apply for the proposed premier hunts in addition to tags they would otherwise apply for anyway.
- Only 4.3% said they would apply for them instead of the tags they normally apply for.
- Nearly a quarter (23.3%) said they wouldn't apply for a premier controlled hunt.

- The response of deer and elk hunters was also examined, but there was no statistical difference between their response and that of the general survey population.

**Table 81: Interest in premier controlled hunts (Q12).**

Premier Controlled Hunts	%
Would apply for in addition too....	59.4%
Would apply for instead of....	4.3%
Would not apply for	23.3%
Not Sure	12.9%
<b>N= 3,118</b>	

#### Frequency and Magnitude of Price Changes

- Almost half of nonresident respondents (47.3%) indicated they would prefer more frequent but smaller price increases.
- Only 11.8% said they would like price increases to be less frequent and larger.

**Table 82: Preference for frequency and magnitude of future price increases (Q14).**

Price Increase Preference	%
More frequent smaller increases	47.3%
Less frequent larger increases	11.8%
Not Sure	40.9%
<b>N= 5,732</b>	

## APPENDIX

- **Mail survey materials**
  - Advance postcard
  - Reminder postcard
  - Cover letter, first mailing
  - Cover letter, second mailing
  - Questionnaire

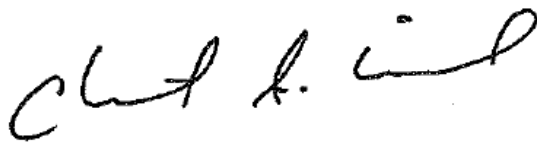
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#### Advance postcard

In about a week, you will receive a short survey in the mail asking about your preferences for different ways to improve fishing and hunting licenses in Oregon. When it arrives in an envelope from the Oregon Department of Fish and Wildlife, please take a few moments to complete the survey. The entire questionnaire should only take about 10 minutes to complete and your answers will be confidential.

We are conducting this survey to help us better meet the needs of Oregon's anglers and hunters.

Thank you for your valuable time!



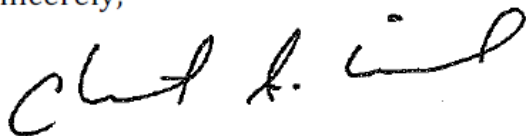
Chris Willard  
Recruitment and Retention Coordinator, ODFW  
503-947-6015 or [chris.a.willard@state.or.us](mailto:chris.a.willard@state.or.us)

#### Reminder postcard

A short time ago, the Oregon Department of Fish and Wildlife sent you a survey asking questions about improving hunting and fishing licenses within the state. If you have already completed and returned the questionnaire, please accept our sincere "Thank you"! The information that you have provided will be invaluable in helping us to serve you better.

If you have not yet completed the survey, please take a few minutes to do so today. Your information is very important to the success of the study. And, if you have any questions about the survey, please do not hesitate to contact me at 503-947-6015 or [chris.a.willard@state.or.us](mailto:chris.a.willard@state.or.us).

Sincerely,



Chris Willard  
Recruitment and Retention Coordinator, ODFW

Cover letter, first mailing



# Oregon

John A. Kitzhaber, MD., Governor

**Department of Fish and Wildlife**

Office of the Director  
4034 Fairview Industrial Drive SE  
Salem, OR 97302  
(503) 947-6044  
FAX (503) 947-6042  
[www.dfw.state.or.us](http://www.dfw.state.or.us)

October 2013

Dear [firstname] [lastname]



The Oregon Department of Fish and Wildlife is considering ways to improve the license buying experience of hunters and anglers in the state by simplifying the license structure and offering products that provide more value. Because you are a valued customer, we are asking for your feedback on a variety of license-related issues.

Please take a few minutes to complete the enclosed survey. It asks about your level of hunting or fishing activity, the kinds of new license options that you might prefer, and your opinion on other topics related to the licensing process. It is a short survey and should take less than 10 minutes for you to complete.

Only a small sample of sportsmen and women who hunt and fish in Oregon have been randomly selected to participate in this survey, so it is especially important that your input is included. Even if you hunt or fish only occasionally, we still would like to hear from you.

When you have completed the survey, simply return it in the enclosed postage-paid envelope. Your responses will be kept fully confidential, and no one will contact you as a result of participating in this survey. If you have any questions about the survey, you can contact Chris Willard at 503-947-6015 or [chris.a.willard@state.or.us](mailto:chris.a.willard@state.or.us).

Thank you for taking time to provide valuable input about fishing and hunting licensing in Oregon.

Sincerely,

Roy Elicker  
Director

Enclosed: Form # R000032

Cover letter, second mailing



# Oregon

John A. Kitzhaber, MD., Governor

**Department of Fish and Wildlife**

Office of the Director

4034 Fairview Industrial Drive SE

Salem, OR 97302

(503) 947-6044

FAX (503) 947-6042

[www.dfw.state.or.us](http://www.dfw.state.or.us)

[Insert Month] 2013

Dear [firstname] [lastname]



A short time ago, the Oregon Department of Fish and Wildlife sent you a survey asking questions about improving hunting and fishing licenses in Oregon. Many sportsmen and women have already responded, but we have not yet received your completed questionnaire. If you just recently put your response in the mail, please accept our sincere "Thank you!" You can disregard this reminder and discard the enclosed questionnaire.

If you have not yet responded to the survey, please take a few minutes to do so today with the enclosed replacement survey. Even if you hunt or fish only occasionally, we would still like to hear from you. The survey is brief, but the information you provide is very important because you were randomly selected to be among a small group of people to represent all sportsmen and women who hunt and fish in Oregon.

When you have completed the survey, please return it in the enclosed postage-paid envelope. You can be assured that your participation is confidential and that no one will ever contact you as a result of participating in this survey. If you have any questions, comments or concerns about the study, please don't hesitate to contact Chris Willard at 503-947-6015 or [chris.a.willard@state.or.us](mailto:chris.a.willard@state.or.us).

I'd like to thank you again for agreeing to participate in this important survey.

Sincerely,

A handwritten signature in cursive script that reads "Roy Elicker".

Roy Elicker  
Director

Enclosed: Form # R000001

## Resident questionnaire

### Oregon Department of Fish and Wildlife (ODFW)



#### Hunting & Fishing License Customer Survey

The Oregon Department of Fish and Wildlife (ODFW) is interested in your opinion as we consider a variety of issues. Please take a few moments to complete this survey. Your responses will be kept strictly confidential. They will be combined with others and used by the Agency to help better meet your fishing and hunting needs. All prices in this survey are based on current prices.

- 1) In the past 12 months, about how many separate days did you **fish** in Oregon?

_____ days fishing	<input type="checkbox"/> I did not fish in Oregon in the past 12 months (skip to #3)
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- 2) In the last 12 months, what did you target on your fishing trip(s) in Oregon? *(Please check all that apply.)*

<input type="checkbox"/> Trout (other than steelhead)	<input type="checkbox"/> Pan fish	<input type="checkbox"/> Sturgeon
<input type="checkbox"/> Steelhead	<input type="checkbox"/> Walleye	<input type="checkbox"/> Halibut
<input type="checkbox"/> Salmon	<input type="checkbox"/> Ocean <b>bottomfish</b>	<input type="checkbox"/> Surfperch
<input type="checkbox"/> Bass	<input type="checkbox"/> Tuna	<input type="checkbox"/> Other

- 3) In the past 12 months, about how many separate days did you **hunt** in Oregon?

_____ days hunting	<input type="checkbox"/> I did not hunt in Oregon in the past 12 months (skip to #5)
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- 4) In the past 12 months, what did you target on your hunting trip(s) in Oregon? *(Please check all that apply.)*

<input type="checkbox"/> Deer	<input type="checkbox"/> Elk	<input type="checkbox"/> Turkey
<input type="checkbox"/> Bear	<input type="checkbox"/> Upland Game Birds	<input type="checkbox"/> Small Game
<input type="checkbox"/> Cougar	<input type="checkbox"/> Waterfowl	<input type="checkbox"/> Other

- 5) Currently all licenses expire at the end of the calendar year on December 31<sup>st</sup>. ODFW is considering fishing and hunting licenses which would be valid for 365 days following the date of purchase. In other words, a license would provide a full 12 months of privileges regardless of when a license was bought. Are you in favor of changing to annual licenses that expire one year from date of purchase?

<input type="checkbox"/> Yes, ODFW should switch to 365-day licenses	<input type="checkbox"/> Not sure/ <b>Don't</b> know	<input type="checkbox"/> No, ODFW should keep the December 31 <sup>st</sup> expiration date
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- 6) ODFW currently offers both the Permanent Pioneer and Permanent Disabled Veteran licenses at no cost to the license holder. Because federal funds allocated to state fish and wildlife agencies are, in part, based on the number of **paid** license holders in the state, ODFW does not receive approximately \$14 in dedicated federal funds for each of these free licenses. ODFW is considering a nominal charge (e.g., \$5.00) for these licenses in order to increase Oregon's share of those federal funds, which would allow us to further support programs that improve fishing and hunting. Would you be in favor of a minimal charge for either of these two licenses?

<input type="checkbox"/> Yes, I would support	<input type="checkbox"/> No, I would not support	<input type="checkbox"/> Not sure/ <b>Don't</b> know
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Form # R000001

- 7) ODFW is considering introducing multi-year licenses. Assume your license has expired and you will be buying a new resident license today. Among the following license options, which one would you buy?

A) Angling license options

License	Price for license	Check <u>one</u>
1-year Angling	\$33.00	<input type="checkbox"/>
3-year Angling	\$95.00	<input type="checkbox"/>
5-year Angling	\$157.00	<input type="checkbox"/>
I would <b>not</b> purchase any of these		<input type="checkbox"/>

B) Hunting license options

License	Price for license	Check <u>one</u>
1-year Hunting	\$29.50	<input type="checkbox"/>
3-year Hunting	\$84.50	<input type="checkbox"/>
5-year Hunting	\$139.50	<input type="checkbox"/>
I would <b>not</b> purchase any of these		<input type="checkbox"/>

C) Combination hunting & angling license options

License	Price for license	Check <u>one</u>
1-year Combo	\$58.00	<input type="checkbox"/>
3-year Combo	\$170.00	<input type="checkbox"/>
5-year Combo	\$282.00	<input type="checkbox"/>
I would <b>not</b> purchase any of these		<input type="checkbox"/>

- 8) ODFW is considering a new **1-day** license option, the Daily Combination License, as a replacement to all current short-term options. The Daily Combination License would provide privileges for both hunting and fishing of species like trout, warm water fish, squirrel, rabbit, and others that do not require a separate tag or validation.

A) Would you purchase a Daily Combination License for \$10?

☐ Yes, I would purchase    ☐ No, I would not purchase (*skip to #8*)    ☐ Not Sure/Don't know

- B) Along with the Daily Combination license, additional daily privileges and validations would be available for purchase at a reduced cost. Please help us determine which privileges most appeal to you by indicating how likely you would be to purchase any of the following privileges.

Daily privilege	Very unlikely	Somewhat unlikely	Not sure/ Don't know	Somewhat likely	Very likely
Combined Angling tag (\$7)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Waterfowl validation (\$4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upland Game Bird validation (\$4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 9) ODFW is considering some new types of license/tag packages. We need your help to determine what types are preferred. Below are three possible new packages and their privileges. Packages #2 and #3 include a fishing or hunting license while Package #1 still requires the separate purchase of a hunting license. Would you purchase any of the following packages?

	Privileges included	Cost if bought separately	Combined package cost	Yes, I would purchase	No, I would not purchase	Not sure/Don't know
#1	Spring or fall Black bear & cougar tags only	\$29.00	\$26.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#2	Annual hunting license & spring turkey tag & waterfowl validation & upland bird validation	\$72.00	\$68.50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#3	Annual angling license & shellfish license & combined angling tag	\$66.50	\$63.25	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 10) Do you have a youth in your household who is age 12-17 and may want to fish or hunt next year?

☐ Yes ☐ No

- 11) ODFW is considering replacing all current youth fishing and hunting license options with just **one** new license, the Youth License. It would be required for all youth ages 12 to 17 and would provide privileges for both hunting and fishing of species like trout, warm water fish, squirrel, rabbit, and others that do not require a separate tag or validation. (Youth Sportspec will not change).

- A) How likely would you buy the Youth License for \$10?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Very unlikely	Somewhat unlikely	Not sure/Don't know	Somewhat likely	Very likely

- B) The pursuit of some species requires tags and special validations. Along with the Youth license, these would be available for purchase at a reduced cost. Please help us determine which privileges most appeal to you by indicating how likely you would be to purchase one of the following privileges.

Youth privilege	Very unlikely	Somewhat unlikely	Not Sure/Don't know	Somewhat likely	Very likely
Combined Angling tag (\$5)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upland Game bird validation (\$4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Waterfowl validation (\$4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 12) ODFW is considering offering unique fishing opportunities, such as retention of oversized sturgeon or wild steelhead, in certain water bodies. The privileges would be awarded through a raffle or auction. How likely would you be to participate in the following to gain a special angling privilege?

	Very unlikely	Somewhat unlikely	Not sure/Don't know	Somewhat likely	Very likely
Raffle (\$5 application cost)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Auction (highest bidders)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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- 13) ODFW is considering two new premier controlled hunts that would provide additional opportunities for hunters. Only two tags would be awarded (one deer and one elk), which would allow hunting statewide from September through November. The application cost would be the same as the current cost to apply for a controlled hunt. But, no preference points would be accumulated for these new hunts, so everyone who applied would have the same chance of being selected.

<input type="checkbox"/> I would apply for these tags <u>in addition</u> to tags that I might otherwise apply for.
<input type="checkbox"/> I would apply for these tags <u>instead</u> of tags that I might otherwise apply for.
<input type="checkbox"/> I would <b>not</b> apply for these tags.
<input type="checkbox"/> I am not sure or don't know

- 14) ODFW periodically raises prices for fishing and hunting privileges in order to meet rising costs and offer new programs. The latest increase occurred in 2010, the first since 2004, and prices rose by an average of 25% over the 2004 levels. In the future, would you prefer:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More frequent but smaller price increases?	Less frequent but larger price increases?	Not sure/ <u>Don't</u> know.

- 15) Do you plan to hunt or fish in 2014 in Oregon? *(Please check all that apply.)*

<input type="checkbox"/> Fish	<input type="checkbox"/> Hunt
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- 16) If you have any comments you wish to share with the Oregon Department of Fish and Wildlife, please write us in the box below or email us at [odfw.info@state.or.us](mailto:odfw.info@state.or.us).

**Thank you for completing the survey!**

*- Please fold your completed survey and return it in the envelope provided -*

## Nonresident questionnaire



### Oregon Department of Fish and Wildlife (ODFW)

#### Hunting & Fishing License Customer Survey

The Oregon Department of Fish and Wildlife (ODFW) is interested in **your** opinion as we consider a variety of issues. Please take a few moments to complete this survey. Your responses will be kept strictly confidential. They will be combined with others and used by the Agency to help better meet your fishing and hunting needs. All questions in this survey are based on current prices.

- 1) In the past 12 months, about how many separate days did you **fish** in Oregon?

_____ days <b>fish</b> ing	<input type="checkbox"/> I did not fish in Oregon in the past 12 months (skip to #3)
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- 2) In the past 12 months, what did you target on your fishing trip(s) in Oregon? *(Please check all that apply.)*

<input type="checkbox"/> Trout (other than steelhead)	<input type="checkbox"/> Pan fish	<input type="checkbox"/> Sturgeon
<input type="checkbox"/> Steelhead	<input type="checkbox"/> Walleye	<input type="checkbox"/> Halibut
<input type="checkbox"/> Salmon	<input type="checkbox"/> Ocean <u>bottomfish</u>	<input type="checkbox"/> Surfperch
<input type="checkbox"/> Bass	<input type="checkbox"/> Tuna	<input type="checkbox"/> Other

- 3) In the past 12 months, about how many separate days did you **hunt** in Oregon?

_____ days <b>hunting</b>	<input type="checkbox"/> I did not hunt in Oregon in the past 12 months (skip to #5)
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- 4) In the past 12 months, what did you target on your hunting trip(s) in Oregon? *(Please check all that apply.)*

<input type="checkbox"/> Deer	<input type="checkbox"/> Elk	<input type="checkbox"/> Turkey
<input type="checkbox"/> Bear	<input type="checkbox"/> Upland Game Birds	<input type="checkbox"/> Small Game
<input type="checkbox"/> Cougar	<input type="checkbox"/> Waterfowl	<input type="checkbox"/> Other

- 5) Currently all licenses expire at the end of the calendar year on December 31<sup>st</sup>. ODFW is considering offering fishing and hunting licenses which would be valid for 365 days from the date of purchase. In other words, a license would provide a full 12 months of privileges regardless of when a license was bought. Are you in favor of changing to annual licenses that expire one year from date of purchase?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Yes, ODFW should switch to 365-day licenses	Not sure/ <u>Don't</u> know	No, ODFW should keep the December 31 <sup>st</sup> expiration date

Form # N000001

- 6) ODFW is considering introducing multi-year licenses. Assume your license has expired and you will be buying a new nonresident license today. Among the following license options, which one might you buy?

A) Angling license options

License	Price for license	Check <u>one</u>
1-year Angling	\$106.25	<input type="checkbox"/>
3-year Angling	\$314.75	<input type="checkbox"/>
5-year Angling	\$523.25	<input type="checkbox"/>
I would <b>not</b> purchase any of these		<input type="checkbox"/>

B) Hunting license options

License	Price for license	Check <u>one</u>
1-year Hunting	\$140.50	<input type="checkbox"/>
3-year Hunting	\$417.50	<input type="checkbox"/>
5-year Hunting	\$694.50	<input type="checkbox"/>
I would <b>not</b> purchase any of these		<input type="checkbox"/>

- C) ODFW is considering a **new** nonresident combination angling and hunting license. If offered, would you purchase any of the following?

License	Price for license	Check <u>one</u>
1-year Combo	\$229.00	<input type="checkbox"/>
3-year Combo	\$683.00	<input type="checkbox"/>
5-year Combo	\$1,137.00	<input type="checkbox"/>
I would <b>not</b> purchase any of these		<input type="checkbox"/>

- 7) ODFW is considering a new **1-day** license option, the Daily Combination License, as a replacement to all current short-term options. The Daily Combination License would provide privileges for both hunting and fishing of species like trout, warm water fish, squirrel, rabbit, and others that do not require a separate tag or validation.

A) Would you purchase a Daily Combination License for \$10?

☐ Yes, I would purchase    ☐ No, I would not purchase (*skip to #8*)    ☐ Not Sure/Don't know

- B) The pursuit of some species requires tags and special validations. Along with the Daily Combination license, additional daily privileges and validations would be available for purchase at a reduced cost. Please help us determine which privileges most appeal to you by indicating how likely you would be to purchase any of the following privileges.

Daily privilege	Very unlikely	Somewhat unlikely	Not sure/ Don't know	Somewhat likely	Very likely
Combined Angling tag (\$7)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Waterfowl validation (\$4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upland Game Bird validation (\$4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 8) ODFW is considering some new types of license/tag packages. We need your help to determine what types are preferred. Below are three possible new packages and their privileges. Packages #2 and #3 include a fishing or hunting license while Package #1 still requires the separate purchase of a hunting license. Would you purchase any of the following packages?

	Privileges included	Cost if bought separately	Combined package cost	Yes, I would purchase	No, I would not purchase	Not sure/Don't know
#1	Spring or fall Black bear & cougar tags only	\$197.00	\$177.25	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#2	Annual hunting license & spring turkey tag & waterfowl validation & upland bird validation	\$256.00	\$243.75	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#3	Annual angling license & shellfish license & combined angling tag	\$153.25	\$145.50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 9) Do you have a youth in your household who is age 12-17 and may want to fish or hunt next year?

☐ Yes ☐ No

- 10) ODFW is considering replacing all current youth fishing and hunting license options with just one new youth license type, the Youth License. It would be required for all youth ages 12 to 17 and would provide privileges for both hunting and fishing of species like trout, warm water fish, squirrel, rabbit, and others that do not require a separate tag or validation (*Youth Sportspec will not change*).

A) How likely would you buy the Youth License for \$10?

☐ Very unlikely ☐ Somewhat unlikely ☐ Not sure/Don't know ☐ Somewhat likely ☐ Very likely

B) The pursuit of some species requires tags and special validations. Along with the Youth license, these would be available for purchase at a reduced cost. Please help us determine which privileges most appeal to you by indicating how likely you would be to purchase any of the following privileges.

Youth privilege	Very unlikely	Somewhat unlikely	Not Sure/Don't know	Somewhat likely	Very likely
Combined Angling tag (\$5)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upland Game bird validation (\$4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Waterfowl validation (\$4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 11) ODFW is considering offering unique fishing opportunities, such as retention of oversized sturgeon or wild steelhead, in certain water bodies. The privileges would be awarded through a raffle or auction. How likely would you be to participate in the following to gain a special angling privilege?

☐

	Very unlikely	Somewhat unlikely	Not sure/Don't know	Somewhat likely	Very likely
Raffle (\$5 application cost)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Auction (highest bidders)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 12) ODFW is considering two **new** premier controlled hunts that would provide additional opportunities for hunters. Only two tags would be awarded (one deer and one elk), which would allow hunting statewide from September through November. The application cost would be the same as the current cost to apply for a controlled hunt. But, no preference points would be accumulated for these new hunts, so everyone who applied would have the same chance of being selected.

- |  |
|--|
| <input type="checkbox"/> I would apply for these tags <b>in addition</b> to tags that I might otherwise apply for. |
| <input type="checkbox"/> I would apply for these tags <b>instead</b> of tags that I might otherwise apply for.     |
| <input type="checkbox"/> I would <b>not</b> apply for these tags.  |
| <input type="checkbox"/> I am not sure or don't know   |

- 13) ODFW is considering adjusting the current prices for the nonresident Annual Angling license as well as the Combined Angling Tag. Currently, the Annual Angling License is priced at \$106.25 or you can purchase the license plus the Combined Angling tag for \$132.75. If these were available at the new price listed below, would you purchase either of the following options?

Options	Price	Choice
Annual Angling license	\$95.00	<input type="checkbox"/>
Annual Angling license and Combined Angling tag	\$112.75	<input type="checkbox"/>
I would <b>not</b> purchase either of these		<input type="checkbox"/>

- 14) ODFW periodically raises prices for fishing and hunting privileges in order to meet rising costs and offer new programs. The latest increase occurred in 2010, the first since 2004, and prices rose by an average of 25% over the 2004 levels. In the future, would you prefer:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More frequent but smaller price increases?	Less frequent but larger price increases?	Not sure/ <u>Don't</u> know

- 15) Do you plan to hunt or fish in 2014 in Oregon? *(Please check all that apply)*

- |                               |                               |
|-------------------------------|-------------------------------|
| <input type="checkbox"/> Fish | <input type="checkbox"/> Hunt |
|-------------------------------|-------------------------------|

- 16) If you have any comments you wish to share with the Oregon Department of Fish and Wildlife, please write us in the box below or email us at [odfw.info@state.or.us](mailto:odfw.info@state.or.us).

**Thank you for completing the survey!**

-- Please fold your completed survey and return it in the envelope provided --